

The Amenity Migrants

Seeking and Sustaining Mountains and their Cultures

*In these times people seek the road through the clouds;
But the cloud road is obscure, without a trace.
The mountains are high, with many steep and narrow passes;
The streams are broad, with little brightness of day.
Emerald green cliffs to the front, and to the back;
White clouds to the west, and to the east.
If you want to find the cloud road,
It is here in the sky.*

Han Shan (Cold Mountain)
Tang Dynasty, China

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Edited by

Laurence A.G. Moss



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Laurence A.G. Moss
Santa Fe, New Mexico
10 November, 2005

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Part I

The Amenity Migrants

The three chapters in Part I of this edited volume describe and analyse key aspects of the amenity migration phenomenon that arch across specific place experiences. They identify significant patterns and offer strategic insights and perspectives for understanding and managing the effects of the amenity seekers on mountain ecologies, including local cultures. As it is early in the development of knowledge about amenity migration, these meta-themes are of particular value.

In the first chapter, Laurence Moss introduces the amenity migrants and describes the development of their movement into a societal phenomenon and also our knowledge about it, focusing on its most significant manifestation – in mountain areas of the world. He then outlines the effects of amenity migration and the little being done in response, mainly some observation of its growth and the generation of wealth from it (especially by the amenity migrants and other ‘outsiders’). The chapter concludes with strategic means for controlling amenity migration which are detailed in Chapter 21. In this discourse the contributions of the book’s other authors are extensively drawn upon.

In Chapter 2, Harvey Locke discusses the spiritual attraction of mountain areas; what draws people and holds them close to these very special places. His personal perspective and insights are universalized by the contemplations, aesthetic works, analyses and actions of others whom he finds in many cultures around the world.

Linda McMillan in Chapter 3 describes and assesses the considerable effects of recreation users (RUs) on mountain areas. Their access and interest have grown dramatically in the past few decades, along with their economic and political clout. Her analysis identifies two types of RUs, traditional and non-traditional (neo-traditional and motorized), and reports on their differing values, behaviour and impacts on mountain ecologies. The author proposes that recreation users are emerging as powerful stakeholders who can be a considerable asset to public protection and conservation of our mountains, especially the traditional users.

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1 The Amenity Migrants: Ecological Challenge to Contemporary Shangri-La

Laurence A.G. Moss

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The Subject and this Book

Around the world there is a growing migration to mountain areas for the remaining concentrations of our planet's natural environment and distinct cultures. Today, this movement is perhaps the most significant manifestation of a societal driving force, amenity migration. There are various interpretations of this complex phenomenon, as the contributions to this book attest. However, generally stated, it is the migration to places that people perceive as having greater environmental quality and differentiated culture. Amenity migration is a reasonable tag for this movement, but like most such designations of complex phenomenon, it misses much of the reality's richness. While the search for distinctive culture and natural environment seem primary, as with human decisions more generally, motivation is frequently difficult to know, complicated and changes through time. Other motives are intertwined here, especially economic gain, personal safety and deeper urges frequently embedded in answers to the migration question like 'a simpler existence', or 'a higher quality of life'. There are also the factors that allow or aid in realizing the motives for migration.

This book focuses on amenity migration to mountain areas. People also seek the amenities of other ecological zones, and while the book contributes to our general knowledge about amenity migration, its primary concern is what is happening in mountain regions.

Peter Nelson (Chapter 4, this volume) states that migration is a fascinating subject. He is right; however, it was not a particular interest in this subject that drew my attention to amenity migration. The initial attractions were simply the beauty of the mountains and the harmonious manner in which many live among them, especially the first settlers. I have cared strongly about these since a child growing up in British Columbia (BC). My father's labour for many years took him frequently to the logging camps perched on the tide line, hard against BC's mountainous fjords. And whenever formal schooling allowed, I joined him. This attraction motivated later journeys to Japan and China as a young man, and then to many other places of mountains over my three score plus years. Mountains are central to my understanding of being, as they are with many others – spiritual medium or end in themselves (Bernbaum, 1990; Locke, Chapter 2, this volume).

Beyond the seeking of mountain amenities, this volume is about the effects of the many incomers today on mountain ecological communities: flora and fauna, including humans and their settlements. It also takes steps to identify what is and may be done to manage amenity migration in a manner that sustains the attributes being sought. This is a considerable challenge. First, there is still little knowledge to base action on. Second, the considerable effects of the intensified focus on enjoying and exploiting mountain amenities over the past quarter century or so have

been complex, with some positive outcomes, but more typically harmful. Improving this condition will depend on a far better understanding of what is happening, and why and where we seem to be heading than is presently common. As many of the authors here have done, it also means looking back at the evolving 'web of life' in which amenity migration now nests.

This book is the first to gather knowledge, interpretations and experiences about mountain amenity migration. It follows from a recently focused growing concern for the condition and future of our planet's mountains (Mountain Agenda, 1992; Dennison, 1995; Messerli and Ives, 1997; Price *et al.*, 2002; Hamilton and McMillan, 2004; Huber *et al.*, 2005; UNESCO-MAB, 2005). It is linked systemically to the contemporary analyses of mountain tourism (Price, 1996; Price *et al.*, 1997, 1999; Godde, 1999; Godde *et al.*, 1999). In addition, it is part of a larger discussion about migration from metropolitan to rural areas, focused on the attraction of the natural environment (Green *et al.*, forthcoming; summarized in Nelson, Chapter 4, this volume, and in Stewart, 2002). This movement includes retirees and the second home owner. The latter occupies the interstices between tourist and migrant and has become the subject of increasing research over the past several years (see especially Williams and Hall, 2003; Hall and Müller, 2004). There have also been previous papers specifically about amenity migration in mountain areas (Moss, 1986, 1994b, 1999, 2004a; Price *et al.*, 1997; Glorioso, 1999; Moss and

Glorioso, 1999; Tonderayi, 1999; Johnson *et al.*, 2003; Chipeniuk, 2004; Hoogendoorn and Visser, 2004; Steinicke and Hofmann, 2004).

I cast a wide net in seeking contributions to this volume. They are drawn from five continents and a spectrum of cultures, climates, ecologies and political-economies. Equally important is the breadth in perspectives: the variety of academic and practitioner purviews involved with amenity migration and their multi-disciplinary orientation and experiences. There were a number of possibilities for organizing the final contributions, but none seemed more appropriate than the simple structure decided upon: meta-themes followed by geographical groupings. The last part of the book takes the reader to amenity migration's likely immediate future and the greater uncertainties of the longer term, along with strategic means for meeting the amenity-led migration challenge.

Amenity migration is described and analysed in seventeen places, varying from international (European Alps), national (the USA) and large sub-national region (inland Australia) to metropolitan peripheral (San Juan, Costa Rica), remote (Bulkley Valley in northern BC, Canada) and the accessible (Santa Fe, New Mexico, USA). These are, however, a small sample from a global phenomenon occurring both within the regions discussed here and in many other places. Amenity migration, by both citizens and foreigners, is occurring in the mountain areas of Western Europe and further east, as in the Czech Republic and Slovenia. Latin American highlands other than the two places dis-



Fig. 1.1. San Martín de los Andes, Neuquén, Argentina, with the Andes Mountains in the background (photograph: G. Villa, courtesy of Tizado Patagonia, August 2004).

cussed here exhibit it, including San Miguel de Allende, Mexico, one of the region's earliest mountain locations of amenity seekers, especially from Canada and the USA, countries whose own mountains are also generally experiencing in-migrants. Amenity seekers have been most written about in the Rocky Mountains, but are also locating in the Sierra Nevada, Cascade, Coast and Coastal ranges to the west and the Laurentian and the Appalachian Mountains in the east.

In Asia, amenity migration is more common than generally perceived, and seems to be spreading. I found amenity migrants in the Chiang Mai region of northern Thailand and in the Cameron Highland of Malaysia. While seemingly fewer, they are also evident in the former imperial hill stations of northern India, the uplands around Bogor and Bandung, Indonesia and Kunming, China. Amenity migration is nascent in the old Lao capital of Luang Phrabang and the former French colonial summer retreats of Dalat and Sapa in Vietnam. In Africa, it is occurring above Marrakech and Fez in the Atlas Mountains, the Drakensberg Mountains of South Africa, and elsewhere. To date, however, there is little information on the magnitude and characteristics of this global change, especially comparative data. Information about mountain amenity migration in the poorer countries is especially sparse, which is particularly unfortunate as they are rich in vulnerable cultural amenities (see p. 8).

Overview of Amenity Migration's Development

Migration reversal for rural amenities

Prior to the industrial revolution and the subsequent swift and quite considerable increase in human population density, the depletion of natural resources and ecosystems were not a human concern. But since then, humans have populated virtually all the habitable surface of our planet and severely altered or degraded much of its biosphere. Unfortunately, this condition is unappreciated by far too many, perhaps a majority of us. And what seems to be a very influential but growing minority of humankind is seeking what remains, especially the best of it – located in mountain areas. Accessing and owning high-amenity landscapes or proximate property now constitute a global driving force. To date, this is most obvious in the more accessible areas of the so-called 'developed' countries, but it is also happening in the more remote and less exploited mountains around the world, often manipulating the traditional lands of indigenous peoples (Grinde and Johansen, 1995; Billy, Chapter 10, this volume).

This amenity-seeking force 'developing' rural areas, to date, seems to be driven as much or more by socio-cultural as by economic reasons. A half-century ago, Edward L. Ullman (1954) identified a reverse in the US migration pattern



Fig. 1.2. Resort village of Snowmass, Colorado, USA (photograph: L.A.G. Moss, May 1990).



Fig. 1.3. Historic manor house in the foothills of the southern Šumava Mountains, Czech Republic, being restored by an amenity migrant (photograph: D. Brown, May 2001).

through his work on regional growth. He found people were moving in increasing numbers from non-metropolitan to rural places for the comparative quality of their natural environment, including the presence of mountains. It was a small part of total US migration flow at the time, remained so over the next several decades, and the principal

migration is still to metropolitan areas (Nelson, Chapter 4; Perlik, Chapter 15; Robinson and Stark, Chapter 8, this volume). Follow-on from Ullman's findings seems surprisingly limited for over a decade, given the possibility that migration for economic benefit may not be as omnipotent as most economic models indicated.

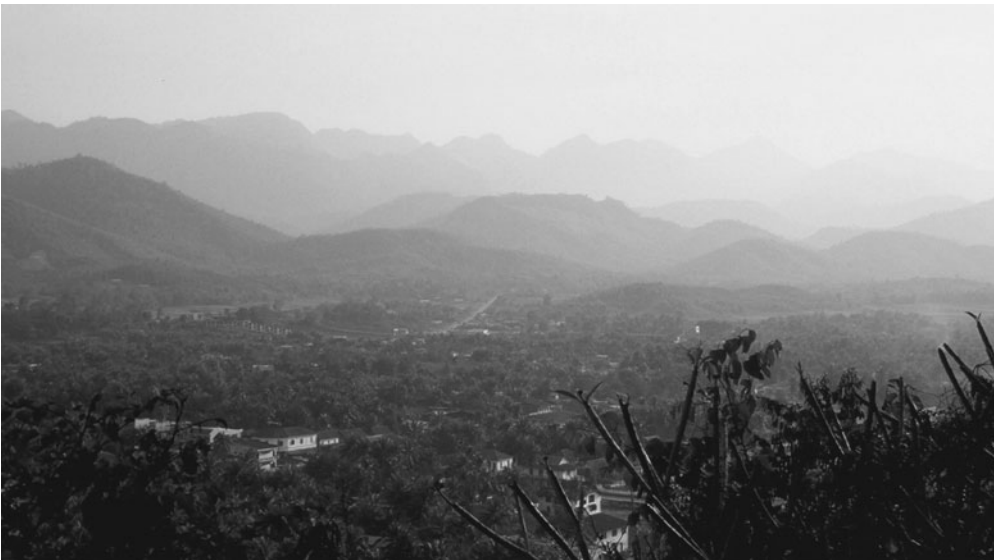


Fig. 1.4. Nascent amenity migration destination, the old royal capital of Luang Phrabang, Laos (photograph: L.A.G. Moss, May 2005).

Development of knowledge about amenity migration

Then in the 1970s, a wider interest developed in the cause of renewed rural growth. Especially significant for understanding the reasons for this reverse migration was the work of Andrew Sofranko and his colleagues at the closing of that decade (Sofranko and Williams, 1980). Focusing on the North Central Region of the US mid-west, Sofranko found that ‘amenity movers’ or ‘amenity migrants’ and ‘job seekers’ were the two dominant types of rural in-migrants, and the former were moving principally to improve their ‘quality of life’. These motives were also intertwined. Subsequently, there was increased research on metropolitan-to-rural migration, notably in the past decade, with a focus on its attraction to natural amenities and associated economic, land use and natural resources impacts (summarized in Stewart, 2002; Nelson, Chapter 4, this volume).

Most of the literature on amenity-seeking migration is about the USA, and especially the mountains to the west, with the notable exception of the mid-west Great Lakes area (summarized in Green *et al.*, forthcoming). Some related research has been undertaken on Western Europe, especially when second home studies are included (see Findley *et al.*, 2000; Paniagua, 2002; Hall and Müller, 2004; Elbersen, 2005; Hall, Chapter 19; Müller, Chapter 17; Perlik, Chapter 15, this volume). Elsewhere there is less, and it typically treats amenity migration in mountain areas (Price *et al.*, 1997; Glorioso, 1999; Moss and Glorioso, 1999; Tonderayi, 1999; Chipeniuk, 2004; Hoogendoorn and Visser, 2004). To this can be added the contributions in this volume.

My amenity migration research originated in concern for cultural (socio-cultural) change, commoditization of culture and the natural environment, and local and regional strategic planning and related equity issues. Instrumental in moving me to amenity migration *per se* were the societal futures analysis and planning I undertook at the research institution SRI International from 1979 to 1983, which helped bring to a recognizable pattern the historic forces of leisure, learning and communications and their reformulations in our late modern period. Especially insightful was a project for National Cash Register’s 100th-year anniversary, which delved deeply into the future

role of information and communications (IC) technology in society and the choices humans have for influencing their future (NCR, 1984).

Subsequently, I became more focused on global cultural commoditization and homogenization and the resulting paradoxical but increasing spiritual, iconic and economic value of especially living ethnographic culture (Moss, 1985, 1994a). This activity corresponded with advising the Government of Alberta in 1985–1986 on establishing a capability to scan and monitor global change for opportunities and threats to the province. In formulating 25-year multiple future scenarios for Alberta, culture and natural environment were further identified as significantly increasing in value: mainly utilitarian, but also intrinsic. There was clear affirmation that a significant shift was occurring in the perception and use of ‘natural resources’ from being extracted and shipped out to being of greater value more or less as is. Rural landscapes, their mountains, forests and waters, were increasingly being sought around the world as leisure, learning or, more generally, quality of life experiences. As such they generated contentment and income. Although considerably less understood and written about, at the same time cultural manifestations of local peoples, particularly their living culture, was increasingly becoming an asset of *place*. These developments seemed important to Alberta’s future, especially to its rural communities, but also to many similar places around the world (Moss, 1994b, 2004a; Price *et al.*, 1997).

Further exploring these findings in 1986, I identified and profiled places around the world with similar attributes to Alberta, especially its small towns. This task dovetailed with a Government of Alberta White Paper on future tourism opportunities and issues for the province, and I was commissioned to undertake a rapid field study of Santa Fe, New Mexico, USA. It was one of the similar places identified and much in the news at the time for its successful economy ‘based on culture and nature tourism’. Using strategic or non-linear analysis (Moss *et al.*, 1999; Glorioso and Moss, Chapter 5, this volume), however, it quickly became apparent that while tourism was important, something else was occurring, similar yet different. A considerable number of people were moving to the Santa Fe bioregion especially to experience its environmental quality and cultural distinctiveness (Moss, 1986, 1994b; Glorioso and Moss, Chapter 5, this volume). At the time I called

this phenomenon amenity migration, and went on to intermittently study and work with it in the Santa Fe bioregion and a number of other places. In doing so, I formulated a preliminary amenity migration construct (Moss, 1994b).

In formulating the construct, or framework, I was especially informed by conditions in southwest USA, northwest North America, and South-east Asia. Of particular influence was the research of the regional economists, Perloff and Wingo (1964), in which they use the term ‘amenity resources’, and the international tourism literature, especially two descriptions of foreign retirees as ‘settled tourists’ or ‘permanent tourists’ (Ball, 1971; de Kadt, 1979). I was unfortunately unaware of Sofranko’s research until 2004, for we had apparently travelled different intellectual paths, although sharing some earlier literature in our separate investigations. I was therefore surprised by his use of ‘amenity migrant’. However, such synchronism is not uncommon.

Lack of socio-cultural information

As noted above, most of the amenity migration research has been about the western USA, and it has focused on the attraction of and impacts on the rural natural environment or ‘natural resources amenities’ (see especially McGranahan, 1999; Stewart, 2002; Nelson, Chapter 4, this volume). Yet from the earliest literature on amenity migration, its impact on the culture of rural areas was identified as also important (Sofranko and Williams, 1980). The relative weakness of our knowledge about amenity migration’s socio-cultural aspects, both motivations and impacts, is mainly the result of little research funding and the comparative difficulty of defining and assessing these factors. For example, in my fieldwork, interviewees usually found it quite difficult to articulate cultural aspects, especially compared with environmental ones. Also, many informants did not or could not distinguish between the cultural and environmental, which is reflected in the use of such generalities as ‘quality of life’, and ‘rural attractiveness’.

Knowledge about rural in-migration for cultural amenities and its specific impacts has advanced little since my last review (Price *et al.*, 1997). It remains comparatively marginal in the literature, reference to it usually being anecdotal: limited observations of the attractiveness or

disappearance of a rural place’s ‘friendliness’ or ‘quality of life’. Probably the best cultural research to date is that of sociologist Patrick Jobses, centred on amenity-migration-driven change in the Gallatin Valley of Montana over a 20-year period (Jobses, 2000). In addition, there are several studies and discussions on the sense of ‘community’ and ‘place’ that focus on contemporary change in rural communities, some alpine (Carroll and Lee, 1990; Kemmis, 1990; Brown, 1993; Jackson, 1996; Godde, 1999; Moss, 1999). This concern is closely linked to flight from large cities, as part of the decision to move lies in the expectation of living in a more traditional communal and place-based ambience (see *Why They Come Up the Mountains*, below).

This present volume, through both quantitative and qualitative micro-level research and larger framing adds to our knowledge about mountain amenity migration and the more general phenomenon. At both levels, it provides additional valuable information about the cultural dimension of this migration (particularly Billy, Chapter 10; Chaverri, Chapter 13; Flognfeldt, Chapter 16; Glorioso, Chapter 18; McMillan, Chapter 3; Nelson, Chapter 4; Otero *et al.*, Chapter 14, Perlik, Chapter 15; Thompson, Chapter 7, this volume). It also assists in concluding that cultural aspects are as important as natural, environmental ones for understanding and influencing the phenomenon. Further, the book contributes to bringing together these two streams of knowledge about amenity migration. Yet, the cultural dimension needs much greater attention, and in undertaking this research it should be more integrated with the study of amenity migration’s environmental aspects.

Definition of environmental and cultural amenities

In summing up this overview, it may serve further discussion to suggest definitions of cultural and environmental amenities. Importantly, the ‘value’ being referred to is both intrinsic and utilitarian, and aesthetic attractiveness may be found in both amenity types.

Environmental Amenities are the valued natural physical attributes of a place, including terrestrial and aquatic landscapes, distinguishing topographical features, climate, air, water and biodiversity quality and quantity.

Cultural Amenities are tangible and intangible manifestations of human groups considered culturally valuable by either their originators or others. Tangible manifestations are artefacts, including the built or significantly altered natural environment. At the more visually perceivable end of an intangibility continuum are the performing arts, spectacles and rites, and toward the other end are audible language, gestures and other shared constructs, such as aesthetic and organizational paradigms.

Why They Come Up the Mountains

Key motivators of amenity migration

Amenity migration is the outcome of a complex web of many dynamic factors. While the specificity of place or experience should be the focus of analysis for action, it is also important to know the larger functioning pattern of the phenomenon one wishes to understand or affect. Attempting to portray this pattern, my 1996 construct had three key motivating factors of amenity migration, particularly for mountain areas: higher valuing of the natural environment, cultural differentiation and leisure, learning and spirituality (Price *et al.*, 1997). When I returned to studying the phenomenon, and particularly in the process of editing this volume, three aspects of the construct became apparent: (i) the core of the construct remains robust; (ii) the key motivators are probably greater in number; and (iii) their relative significance changes through time, although natural environment and culture appear to remain meta-motivators.

Superior natural environment and differentiated culture

While the number of detailed studies about amenity migration is still relatively small and geographically limited, the information indicates that comparatively high quality of the natural environment and differentiated culture are the key attractions, and the relative strength of mountain zones in these amenities results in migration to them. But more than just the existence of these amenities causes this migration. They attract

because of contemporary higher societal valuing of them, particularly as they are diminished or degraded. While both these amenities are important for attracting the in-comers, their existence and relative attractiveness varies with place and over time. From available information it appears that mountain natural environment is the more common motivator or, for some places, is the more articulated of the two by the amenity seekers and the promoters of their migration (especially land developers and real estate agents; public tourism and recreation officials).

In this volume, Australian, Canadian and US studies in particular substantiate earlier reports that a western or rural lifestyle is an important attractor of amenity migrants (Buckley *et al.*, Chapter 19, Glorioso and Moss, Chapter 5; Lynch, Chapter 6; Nelson, Chapter 4; Robinson and Stark, Chapter 8; Thompson, Chapter 7, this volume). While generally thought to be a big city attribute, the *haute culture* of Santa Fe, Jackson Hole and other similar-sized destinations is also identified as attractive (Moss, 1994b; Lynch, Chapter 6; Glorioso and Moss, Chapter 5; McMillan, Chapter 3, this volume).

Perlik (Chapter 15, this volume), based on a study of Switzerland (Schuler *et al.*, 2004), points out that, after a 20-year-long inverse period, since 1995 urban culture has become the principal form of cultural attraction, and that the Alps allow for both city-located culture and rural-located natural environment to be virtually simultaneously enjoyed, principally due to ease of access. This focus on urban culture may also be the result of a weakening or passing of distinguishable ethnographic culture in the Alps.

Santa Fe, New Mexico, has been an example of richness in both major amenity types: (i) culture: American Indian, Hispanic, western American, *haute culture* and New Age; and (ii) natural environment: beautiful and recreation-amenable landscapes and a moderate, sun-filled climate (Glorioso and Moss, Chapter 5, this volume). The Santa Fe bioregion studies indicated that its American Indian culture ranked highest among the motivators of amenity seekers (Moss, 1994b; Price *et al.*, 1997). Related, it also has the reputation of a spiritually evocative place, one that continues to attract spiritual seekers and centres to it. Other studies in this volume (Chaverri, Chapter 13; Glorioso, Chapter 18) also identify

indigenous or ethnographic culture as quite important. But, there is also the case of the Secwepemc people's struggle for cultural survival, where governmental and corporate promoters of amenity seeking seem determined to ignore, or be party to the destruction of a place's indigenous culture (Billy, Chapter 10, this volume).

Leisure and learning

The understanding and unbundling of the third motivator, the leisure, learning and spirituality set, used in the earlier amenity migration construct has been particularly advanced by Glorioso, Locke and McMillan in this volume. Therefore, an improved structuring of the basic relationship among these three motivations is suggested. The seeking of spiritual growth and gratification through proximity to mountains may be considered an aspect of the learning motivation, in that spiritual attainment is part of learning for personal development or societal betterment (see Fig. 1.5). This needs further exploration, especially in relation to the place of nature and wilderness in the popular mind and the 'return to Nature' urge of the urban middle class, perhaps particularly in the USA (Abbey, 1988; Schmitt, 1990; Jackson, 1996; Harman, 1998; Esparza and Carruthers, 2000; Jacobs, 2003). I think this is a motive that has much to do with the contemporary increase in the move to mountains. Interviewees in Baguio (Philippines), Chiang Mai (Thailand), Santa Fe (USA), Sierra Nevada mountains (USA) and to a lesser degree those in Sunriver (USA) and Šumava (Czech Republic), expressed this sentiment of seeking spiritual growth and gratification by being in the mountains (Callen *et al.*, 1993; Moss, 1993, 1994b, 1999; Glorioso, 1999).

Some amenity seekers' pursuit of leisure is also for personal development, especially for better health. But in the contemporary amenity migration context, leisure seems most sought as an end in itself, hedonistic and most often pursued through recreation (Leopold, 1949; Clifford, 2002; Glorioso, Chapter 18; McMillan, Chapter 3, this volume). From this perspective, therefore, we may generally understand leisure and learning to be motivators and objectives, sought through the medium of cultural and environmental amenities (see Fig. 1.5).

Economic gain

I have added two key motivators to the earlier amenity migration construct: economic gain and the problems of large cities (see Fig. 1.5). While identified in my earlier research (Moss, 1994b; Price *et al.*, 1997), generally, they did not seem to be key factors for amenity migration *per se*. However, from more recent reviewing of rural in-migration studies, economic gain is indicated to be a key motivator, in combination with natural and cultural amenities (Rudzitis, 1996; Rasker and Alexander, 1997, 2003; Nelson, 1999; Jobs, 2000; Shumway and Otterstrom, 2001; Booth, 2002; Johnson *et al.*, 2003; National Parks Conservation Association, 2003; Rasker *et al.*, 2004). Contributions to this volume concur (Glorioso and Moss, Chapter 5; Lynch, Chapter 6; Nelson, Chapter 4; Otero *et al.*, Chapter 14; Thompson, Chapter 7; Robinson and Stark, Chapter 8). In addition, these studies and others in this publication (Flognfeldt, Chapter 16; Glorioso, Chapter 18; Hall, Chapter 20; Müller, Chapter 17) show this in-migration correlates with growth in local and regional economic activity, and that jobs both follow and are locally created by amenity migrants. Nelson, Chapter 4, Otero *et al.*, Chapter 14 and Thompson, Chapter 7 (this volume) in particular identify amenity migrants as new local entrepreneurs.

Research focused on the relationship of tourism and migration using a consumption/production-led model is important for understanding this motivator (see especially Williams and Hall, 2003; Hall and Müller, 2004). It shows that many in-migrants principally motivated by the consumption of amenities find or make work after their arrival in high-amenity places. Müller (Chapter 17, this volume) cites a Swedish study in which 80% of the in-migrants were amenities 'consumption led', the remainder being 'primarily production led' (moving for specific employment opportunity). The construct suggests a useful tool for further amenity migration analysis.

Understanding the relationship between amenity migration and tourism has been advanced here. Perlik (Chapter 15) finds that the European Alps' tourism typically excludes amenity migration. However, in other places studied, tourism is a primary source of income for amenity migrants wanting to obtain it from their new place of resi-

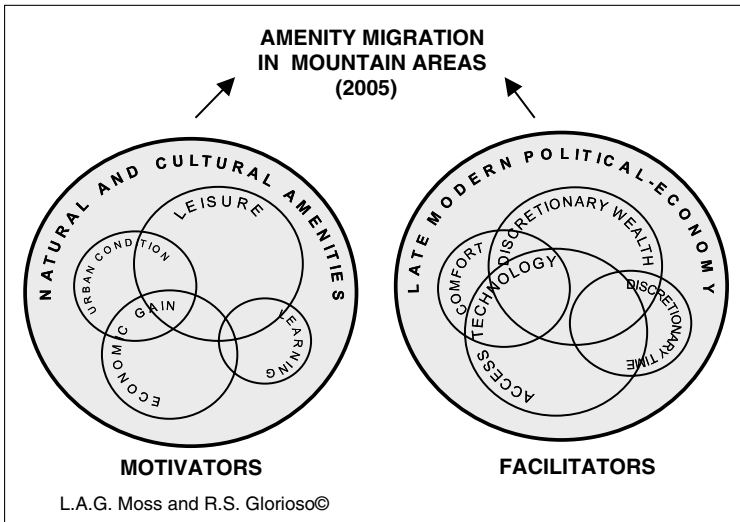


Fig. 1.5. Contemporary amenity migration construct.

dence (Glorioso, Chapter 18; Hall, Chapter 20; Moore *et al.*, Chapter 9; Müller, Chapter 17; Otero *et al.*, Chapter 14; Thompson, Chapter 7, this volume). Also, as was earlier thought, amenity migrants first visit as tourists; however, many also come directly as migrants, especially the wealthy, to places where they congregate (Moss, 2004b; Buckley *et al.*, Chapter 19; Glorioso and Moss, Chapter 5; Otero *et al.*, Chapter 14, this volume). Anecdotal information suggests this direct migration increases with a destination's growth in reputation, population and economic activity.

Amenity migrants are also involved in other local economic activities, both mundane and knowledge intensive. Common examples of the former are construction labour, retail clerking and real estate sales. The knowledge-intensive or learning sector includes private, public and quasi-public research and development, manufacturing and personal services in the arts, communication, finance, health, environmental design, engineering, science and spirituality. Many of the services are offered through non-formal educational institutions along with the traditional educational and research institutions, at levels from primary through post-graduate. These activities make up much of the New Economy (Alcaly, 2003), and are characteristically interwoven with one another in the high-

amenity centres of especially the New West (Moss, 1994b; Price *et al.*, 1997; Jobs, 2000; Levitt and Vilsack, 2002; Glorioso and Moss, Chapter 5; Lynch, Chapter 6, this volume).

The mountain amenity migration literature shows that many of these migrants are economically active but not locally employed. 'Non-labour income' is quite significant: a mixture of investments (dividends, interest, rents) and government transfer payments to individuals (mostly retirement related). 'In some communities the mail box is the largest source of income' (Rasker and Alexander, 2003: 2). Some are employed elsewhere and commute physically and via the Internet. This volume's contributions confirm this condition.

The indication in earlier research that some amenity migrants struggle to support themselves is pursued further in this volume (Glorioso and Moss, Chapter 5; Müller, Chapter 17; Otero *et al.*, Chapter 14). Some are under-employed in terms of their education and their available time, but even if fully employed in low-paying jobs, the typical high cost of living in high-amenity centres often makes it difficult to make ends meet. Compared to income opportunities elsewhere, in order to live in their chosen place, an apparently significant number of amenity migrants accept a reduction in income and material standard of living (Moss, 1994b; Jobs,

2000; Stewart, 2002; Glorioso and Moss, Chapter 5, this volume). These amenity migrants are not particularly interesting to the mainstream analysis being done on high-amenity places, which has a strong economic utility bias.

Economic gain, or the hope for it, appears to play a larger motivational role for amenity migrants in less wealthy societies (Glorioso, 1999; Chaverri, Chapter 13; Glorioso, Chapter 18; Otero *et al.*, Chapter 14, this volume). My research also suggests that earlier in amenity migration's development, economic gain was not a key factor, but with the growth and development of a destination it increases as a reason for in-migration. If it becomes the primary motivation for migrants' relocation they should not be referred to as amenity migrants, but rather as 'economic migrants' (Moss, 1994b; Glorioso, 1999; Moore *et al.*, Chapter 9, this volume). There is also some evidence that in poorer countries in particular, such as the Philippines and Thailand, amenity migration, along with tourism, is a beacon that attracts large numbers of the less fortunate from the greater society (Moss, 1993; Glorioso, Chapter 18, this volume). If incomers are attracted to economic activity resulting from the local amenities, they along with amenity migrants are considered 'amenity-led' migrants.

The above observations, however, to date do not characterize the European Alps or perhaps much of Western and Central Europe (Bartoš *et al.*, 2005; Flognfeldt, Chapter 16; Perlik, Chapter 15, this volume), and seem less pronounced in the New England (Glass, Chapter 12; Nelson, Chapter 4, this volume) and southern Appalachian regions of the USA (Culbertson *et al.*, 2004). In these regions, travel time between dense economically or culturally attractive urban places and the location of mountain amenities is characteristically short and convenient, which seems to limit actual migration. For example, about 100 million people live within half a day's drive of the southern Appalachian Mountains. But if distant, they take their jobs with them or make new ones. In addition, a yet unknown percentage of amenity seekers, especially the wealthier immersed in the 'New Economy' (Price *et al.*, 1997; Glorioso, Chapter 18, this volume), move back and forth with relative ease over physical distances previously considered inconvenient (see Access-facilitating technology below).

Flight from large cities

From the 1970s on, in studies about US metropolitan-to-rural migration, negative large-city conditions have also been identified as motivating out-migration for perceived or real superior amenities (see especially Sofranko and Williams, 1980; Stewart, 2002; Nelson, Chapter 4, this volume). Mountain areas receive part of this exodus. The usual urban push factors identified are high crime, high cost of living, degraded or negligible natural environment, eroded social services, crowding and a high general stress ambience. Flognfeldt (Chapter 16, this volume) finds that a few negative social aspects of urban living in Norway are rural relocation considerations of parents. In the Argentine study, this urban push factor mainly took the form of 'terrorism' from 1975 to 1982 (Otero *et al.*, Chapter 14, this volume). The development of these city problems should also concern urbanizing high-amenity places. On the other hand, Perlik (Chapter 15, this volume) sees in the relatively attractive condition of medium-sized European metropolitan areas, no similar reason for leaving urban or peri-urban areas for rural ones.

Key facilitators of amenity migration

Discretionary time and wealth

The appearance and growth of amenity migration is the result of the coming together of the motivators outlined above with a marked improvement in conditions to facilitate them. My earlier amenity migration construct identified three key facilitating factors: increasing discretionary time and wealth and increasing access through improving and less expensive communications and transportation technology (Moss, 1994b). Although discretionary time may not be, or has not remained, as common as earlier indicated, especially in free-market, consumer-driven societies (Glorioso, 1999; Moss, 1999), it still seems to be a key factor. More wealth is being generated and it is facilitating greater mobility, although this wealth and mobility appear to be concentrating in fewer people. Yet to date, as contributions to this volume and other sources indicate, wealth generation is allowing many more to move in some manner to the mountains (Rasker and Alexander,

1997; Nelson, 1999; Booth, 2002; Clifford, 2002; Buckley *et al.*, Chapter 19; Glorioso, Chapter 18; Glorioso and Moss, Chapter 5; McMillan, Chapter 3; Thompson, Chapter 7, this volume).

Access-facilitating technology

In 1980, Sofranko and Williams suggested that future growth of the then new rural in-migration would be tied to the existence and spread of 'modern transportation, communication and other service delivery systems to formerly remote areas' (1980: 200). This has occurred due to air and ground transportation improvements, accompanied by comparatively cheap oil, and because of information and communications (IC) technological innovation. For mountain areas in particular, there has been increased access through the ability to manipulate time in a manner that allows for the occupation of places, either physically or virtually, that previously far fewer had the time to be in. This change has greatly facilitated amenity migration. In addition, this technology has played a principal role in the emergence and spread of the 'New Economy' (Levitt and Vilsack, 2002; Alcala, 2003), with significant impacts on mountain areas (see *Economic gain* above).

The debate over whether, and how much, 'footloose industry' is actually locating in non-metropolitan areas, especially in the mountains, is important (Moss, 1999; Stewart, 2002; Johnson *et al.*, 2003; Glorioso, Chapter 18, this volume), with the information available suggesting that this shift is not yet significant. However, of equal or greater importance is the considerable and general impact of the integration of IC technology into most human activities and the resulting facilitation of interaction and access, especially for historically inaccessible mountain areas. This includes individuals working part or full time from their mountain locations.

Comfort amenities

The significance of 'comfort amenities' for migration to high-amenity centres has been a difficult facilitator to assess, especially at the global scale. Here I am referring to a set of comfort and convenience amenities typically available to the middle-to upper-income urban dweller in late modern economies: high-standard public facilities

and services like paved roads, water, electricity and waste management systems, hospitals, libraries, fire protection, etc., along with complementary private amenities, such as a selection of physicians and other professionals, and sports and social clubs. From the 1980s to the mid 1990s, the general importance of these amenities seemed ambiguous (Price *et al.*, 1997). However, since then they have taken on greater importance, especially as a facilitator for the migration of the older and wealthier amenity seekers (Moss, 2004b). Therefore, I have now included them as a key facilitator of amenity migration (see Fig. 1.5). Also, I suggest that, similar to the economic gain motivator of amenity migration, as a destination grows in reputation, population and economy, this key factor also increases in importance. There also seems to be a growing demand for luxurious material comfort in beautiful, natural settings, usually suggesting a conference of social prestige. The hallmarks are amenity centres like St Moritz, Switzerland and Santa Fe, USA.

Energy costs

It would be remiss to close this discussion on increased facilitation without reference to the constraining impacts of rising energy costs, principally oil depletion implications, especially for transportation of goods and people up into mountain areas. Negative impacts on the key facilitators outlined here are discussed further in Chapter 21, in the *longer view* context.

When is an Amenity Migrant a Migrant?

In addition to the considerable challenge of amenity migration to sustaining mountain ecosystems and cultures, it is also a challenge to define. For general framing purposes I return to the definition given at the beginning of this essay: migration to places that people perceive as having greater environmental quality and differentiated culture. The weighing of these two attributes will differ with individual migrants. If a primary causal role of contemporary IC technology in the emergence and development of amenity migration is accepted, I suggest earlier amenity seekers were not 'amenity migrants', but rather 'proto-amenity

migrants' (following Glorioso, 1999). Others, however, consider amenity migration as not being primarily dependent on the advent of the new IC technology, but that amenity migration began in an earlier, unspecified time. In this view the IC-dependent phenomenon may be considered 'contemporary amenity migration'.

A number of the authors in this volume consider all movement for amenities as amenity migration, while distinguishing between the amenity migrant and tourist principally due to the intent of the tourist being to visit, not to reside in a destination. Glorioso and I have classified the amenity migrant into three temporal categories of residence: intermittent, seasonal and permanent (Moss, 1994b, 2004a; Glorioso, 1999), and it is this interpretation that I use in this essay. Chipeniuk (Chapter 11, this volume) and Buckley *et al.* (Chapter 19, this volume) refer to only those who move 'permanently' as amenity migrants, viewing the shorter-term migrant as similar to the tourist, especially from the perspective of their local impacts. Similarly, a United Nations Environmental Programme (2001) study on economic impacts of tourism refers to second-home dwellers as 'long term tourists' and distinguishes them from amenity migrants.

Research on second-home ownership favours a dynamic model, in which while this dwelling type is not the owners' permanent residence owners are considered similar to tourists, but if and when they become permanent residents they are migrants (Stewart, 2002; Williams and Hall, 2003; Hall and Müller, 2004). Flognfeldt (Chapter 16, this volume) distinguishes between 'semi-migrant' and 'permanent migrant', the latter being amenity migrants. Perlik (Chapter 15, this volume) considers only permanent migrants to be amenity migrants, unless the intermittent or seasonal residents have formed strong attachment to local society, promote regional innovation or transfer external knowledge.

The amenity migrants' perception of 'belonging' or 'attachment' to their amenities residence appears to vary and also to change over time. Amenity migration research in Santa Fe, New Mexico; the Sierra Nevada, California; and Sunriver, Oregon, and to a lesser degree, the Chiang Mai, Thailand case, indicated that even homeowners in frequent and permanent residence often did not have a feeling of belonging to

their 'community' of residence. More commonly, if they had a sense of place attachment, it was to a previous place of residence, or where they still had another home (Callen *et al.*, 1993; Moss, 1993, 1994b, 1999, 2004b; Price *et al.*, 1997). Sierra Nevada, California data indicated that intermittent and seasonal amenity migrants particularly felt little sense of attachment to the communities of their second homes (Moss, 1999).

The same studies also showed that a progression beginning with return visits, then owning a second home, and finally being in permanent residence (Stewart, 2002; Buckley *et al.*, Chapter 19; Flognfeldt, Chapter 16; Hall, Chapter 20, this volume) may also not be as common as thought, but rather part of a larger pattern. For they also indicated that residence may never be more than occasional, and also that the first residing is 'permanent'. Further, 'permanent' with hindsight was not necessarily so, but rather one stop in what I have referred to elsewhere as 'serial amenity migration' (Moss, 1999). This information raises the issue of the significance of place-based community today and in the future (Snyder, 1994; Jackson, 1996; Godde, 1999; Moss, 1999; Glorioso, Chapter 18, this volume). To what degree has it become more of a myth than reality, especially in societies with populations of high spatial mobility, dominated by values of utility and consumerism?

The changing character of 'retirement' is another significant factor for understanding amenity migration. Early retirement, the need or wish to remain employed, plus the tendency to move elsewhere, all appear to be increasing in economically developed societies (McHugh *et al.*, 1995; Stewart, 2002; Glorioso, Chapter 18, this volume). One outcome is that permanent residence appears more dependent on growth and development and income opportunities proximate to the second home and on retirement (Stewart, 2002; Hall, Chapter 20, this volume). Nevertheless, the more traditional retiree is still an important part of the permanent type of amenity migration, even though 'permanent' may not recently be as final as it has been.

The definition of amenity migration may vary. More important is a clear understanding of the values, norms and behaviour of the migrant types with regard to sustaining mountain ecology and human culture, particularly for the specific place or issues of concern. Also, when categoriz-

ing only the permanent resident as an amenity migrant, it is important to also consider the impact of the others.

Why a Mountain Focus for Amenity Migration?

Amenity migrants have located on the plains and coasts and in the mountains, and they have much in common across these ecological zones. What may be said comparatively is that migration for amenities to attractive, habitable plains and coastal areas in the main occurred at an earlier date, and their access has been easier and distance to metropolitan areas shorter. Now human population is greater and denser, costs are typically higher and attractive property is less available than in mountain areas. This general statement has obvious exceptions where coastal areas are being developed later, such as in Australia (Buckley *et al.*, Chapter 19, this volume), where mountain access from cities is swift and convenient as in the European Alps (Perlik, Chapter 15, this volume), and where mountain amenity migration is already considerable, such as Aspen, Colorado; Santa Fe, New Mexico; or Whistler, BC. (Aspen Institute, 1996; Moss, 2004a; Glorioso and Moss, Chapter 5; Moore *et al.*, Chapter 9, this volume). Also, in the tropics, the comparative coolness of the highlands has long made them particularly attractive (Glorioso, Chapter 18, this volume). In addition, there are a few well-developed regions with proximate coastal and mountain places of equally developed attractiveness, such as within the Mediterranean Riviera or California.

Mountain areas are now premier destinations for amenity migrants and cover a significant part of our planet, 24% of the land surface (Price, 2004). Thus, alpine amenity migration is a significant contemporary societal change, one made even greater by the economic migration that follows amenity movers and their cousins, the tourists.

In addition to the pressures of this location preference, there are the specific characteristics of mountains that both attract and need special consideration. The attractions are outlined above, so I now turn to why specific care is needed for both

mountains and those who dwell among them. A discourse on what constitutes a mountain can be read in Ives *et al.*, 1997. The salient characteristics are: 'a juxtaposition of *steep slopes* and *altitude*, facets of mountain landscapes that individually, or in tandem, lead to marginality in the sense of human utilization and adaptation' (Ives *et al.*, 1997: 3). They go on to detail the fragility, complexity and rich biodiversity of mountain ecosystems. Mountains are also highly vulnerable to human intervention and can be catastrophic to human life and property (including our built environment) due to down-slope mass movements: rock falls, landslides, avalanches, dam bursts and floods (Herwitz, 1997). They are also characterized by extreme fluctuations in climate and a global warming tendency (Price and Barry, 1997; UNESCO-MAB, 2005). Advances have been made that make living in mountain environments more possible, but these intrinsic characteristics continue to need careful attention.

The inhabitants of mountains account for 12% of the world's population and can be characterized as the poorest and most marginalized people of our planet (Messerli and Ives, 1997). While mountain areas in general are considered low in human population density, because of their special characteristics large areas of land are unsuitable for human occupation, and many areas are therefore overpopulated in relation to agricultural and other development potential. In many mountain communities in richer countries, but especially in poor countries, this condition is aggravated by high rates of underemployment and unemployment, fuel shortage, environmental stress, and inadequate infrastructure and services. At the same time, environmental conservation and socio-cultural and economic development programmes for mountain areas are comparatively limited (Tobias, 1986; Grötzbach and Stadel, 1997; Moss and Godde, 1999). In addition, a bias exists against concern for and assistance to indigenous peoples, which is evident in some parks and protected area management and the work of some environmental conservation organizations (Chapin, 2004; Chettri, 2005). 'In the conservation field, conventional protected area management dominated the last 100–150 years. The conservation measures have tended to see people and nature as separate entities, often requiring exclusion of human communities from

areas of interest, prohibiting their use of natural resources and seeing their concerns as incompatible with conservation' (Chettri, 2005).

It is also the mountain peoples of the world that manifest the most distinctive and varied living cultural attributes. Before the middle of the last century, the peoples of the world's mountains had been relatively isolated and inaccessible. 'Thus they harboured a wealth of human tradition and culture more varied and more intricately related to nature than could be found anywhere else' (Ives, 1986: 3). Although these traits have diminished, and in places been severely degraded with growing access and integration, and private and public economic development schemes (typically externally driven), their distinctiveness remains relatively substantial and manifest. Today many of these peoples have taken on a heightened attractiveness for their spiritual philosophies and practices, along with their symbiotic relationship to and representation in the surrounding peaks. These cultural attributes of 'the Other' are key amenities sought especially by lowlanders from 'developed' urban society (Clifford, 1988; Moss, 1994b), motivated by both learning and leisure, but predominantly the latter (see Fig. 1.6).

In addition to supporting those residing in the mountains, a vastly larger number of humans inhabiting the lowlands below also rely on mountain ecosystems for their subsistence. Over a bil-

lion people depend on mountains for the basics of water, food and forest products and recreation. Billions more benefit from energy and minerals, biodiversity-based goods and many environmental services originating in the mountains (Messerli and Ives, 1997; Price, 2004).

In conclusion to this section, it should be stated that with contemporary demands of amenity migrants, economic migrants and tourists on mountains, and in view of the special sensitivity of mountain ecologies, a particular focus on mountains is critical. Advancements have been made in the international arena by the European Union (Perlik, Chapter 15, this volume), the United Nations and The World Conservation Union, along with some national bodies, learning centres and volunteer organizations (Godde *et al.*, 1999; Hamilton and McMillan, 2004; Price, 2004), but more attention is essential.

The Effects of Mountain Amenity Migration

Although they were historically isolated and still are comparatively so, mountain areas have become a turbulent cockpit for the global forces driving societal change. Amenity migration is both a product of this change and a premier vehi-



Fig. 1.6. Living First Nations' culture, Santa Fe bioregion, New Mexico, USA: Deer Dancers of Powhogeheh (San Ildefonso Pueblo) (photograph: L.A.G. Moss, July 1990).

cle for it. While there is still much to learn about its effects in the mountains, a pattern is emerging. A sketch of its key characteristics follows.

Key cultural and economic effects

Population change in mountains associated with amenity-led migration is considerable, rapid and characteristically stressful for both newcomers and earlier residents. The increase in amenity migrants is considerable, particularly where they congregate, compared with the number of earlier inhabitants. Given especially the metropolitan origins of most amenity migrants, they upset old rhythms, stress and change often more traditional local values, norms and behaviour, which in turn create a complex, turbulent and at times unexpected mix of animosities and conflicts, convergences and alliances. Included are rancher and environmentalist in conflict or collaboration, and newcomers for and against local 'growth' or 'development' (Price *et al.*, 1997; Duane, 1999; Moss, 1999; Jobs, 2000; Johnson *et al.*, 2003; Chaverri, Chapter 13; Moore *et al.*, Chapter 9; Otero *et al.*, Chapter 14; Thompson, Chapter 7, this volume). To this situation can be added welcoming, ambiguous and antagonistic local and the national response to foreign amenity migrants (Glorioso, 1999; Chaverri, Chapter 13; Glorioso, Chapter 18; Hall, Chapter 20, this volume). How common this tension is between new and earlier inhabitants is uncertain, but it is reported frequently. Some also question its significance (see Stewart, 2002).

The detrimental effects are heightened by the impermanence of much amenity migration. It results from both the magnitude and frequency of part-time residence and the impermanence of even the 'permanent resident' – amenity seekers who did not find what they wanted or thought they wanted, could not make it financially, or felt the urge to seek greener pastures, especially after degrading of the present one, which may have been due to their own behaviour (Moss, 1994b, 1999; Snyder, 1994; Glorioso, 1999; Jobs, 2000; Glorioso, Chapter 18; Glorioso and Moss, Chapter 5, this volume). There are also the negative impacts of amenity migrants' limited or lack of local attachment or commitment.

Wealth can be a lightening rod for turbulence and this seems more evident where wealthy

amenity seekers congregate. Its presence and use differ among the amenity migrants. However, a large number of them are from the upper economic strata of consumer society, and particularly given the mountain condition and culture of scarcity, their consumption is considerable and conspicuous. Both imported and scarce local resources are consumed: land, water, food, energy and labour. This emphasizes the comparative lack of purchasing power of locals and reduces their use and control of local resources.

Further, locals are displaced by the increase in the price of goods and services. While the range of choices usually increases with the numbers of amenity migrants, all prices rise. Real estate is a particularly important issue. As a number of authors here point out, its market value not only increases, but can do so phenomenally. Although some locals as well as newcomers profit, for many locals, poorer amenity migrants and economic migrants, hardship is the result (see especially Glorioso and Moss, Chapter 5, this volume). Along with increasing property values, taxes and rent, it reduces their access or displaces them from preferred or essential socio-economic networks and locations. Locals, along with lower-income migrants, must move to more peripheral places with comparatively inferior facilities and services, and typically with long commutes to employment in the amenity centres (see especially Lynch, Chapter 6, this volume). The lack of reasonably priced housing in amenity-rich places is the particular focus of the chapter on Whistler, BC, Canada (Moore *et al.*, Chapter 9, this volume). It demonstrated that even in a community with a serious concern for its housing problem, solutions to it are evasive.

While wealth is a primary vehicle for in-comers' control over local resources, there are other means. Their better understanding of and political-economic connections with the outside world also play an important role. This is evidenced particularly where the in-migrants have entered the local political arena in numbers. Nevertheless, as many locals are skilled at the resources game, are playing on home turf and opposing sides are rarely drawn up in a dualistic fashion, the result is often one of extended stress, with wins, draws, accommodations and collaborations (Duane, 1999; Jobs, 2000; Glorioso, Chapter 18; Perlik, Chapter 18; Thompson, Chapter 7, this volume).

As outlined in *Why They Come Up the Mountains* above, amenity migration also creates wealth and jobs in the mountains, and there is some indication that out-migration is being reduced by new employment (Stewart, 2002). But questions still to be clearly answered are: for whom are the wealth and jobs created, and how many of what kinds of jobs? From Santa Fe's experience it would seem that the new jobs are commonly low-paying service-sector ones (Glorioso and Moss, Chapter 5, this volume). In addition, new managerial and higher-income knowledge-sector jobs are mainly occupied by the in-comers who bring in the instrumental capital and knowledge. Stewart points out: 'place utility models predict that wage levels in high amenity places can be lower because wages are effectively augmented by the benefits one receives from living in a nice environment' (Stewart, 2002: 370). But, as she goes on to point out, aside from this argument maintaining the integrity of wage-based migration models, the extent to which the value of amenities can be captured in utilitarian money terms and the degree to which these values are shared across groups is open to question. This question also goes to the issue of core value conflict in the mountains, and the effective removal from locals of amenities they had access to before the in-migrants increased their cost. Also not accounted for is the social hardship created by the high cost of living in high-amenity centres for lower-wage-earning locals and in-comers (see *Why They Come Up the Mountains*).

In-migration-driven population growth has also brought to many high-amenity places improved public infrastructure and services, such as roads, waste management, flood control, hospitals and schools. On the other hand, as the local mountain standards are characteristically considerably lower than the urban amenity migrants are accustomed to, the latter typically push for more than the local tax roles can provide, and usually more than the larger jurisdictional governments (e.g. state and national) will deliver. This also contributes to communal tension.

Principal biophysical effects

Much of the population growth in mountain areas can be attributed directly to amenity migration and indirectly to the economic migration it stimu-

lates. While there are other causes, especially global warming, military activity and tourism, existing information about amenity migration indicates it is bringing about considerable physical change in the natural environment and human settlements of mountain areas. And the more this population grows, the greater is its likely impact.

The following discussion focuses on what seems to be typically occurring in the mountains, except for the European Alps with its mountain peripheral city pattern, and perhaps more generally Western Europe (Perlik, Chapter 15, this volume). Land development has pushed the boundaries between human habitation and undeveloped land further out into the landscape, increasing the urban-wild land interface. Commonly, in this process open space and wild lands are reduced and fragmented, wastefully converted at low densities, and aesthetic attributes compromised by loss of scenic landscapes and view sheds. Most of this considerable land conversion has been for residential use. It has occurred in small towns and villages and has spread out over the valleys and up the mountain slopes. Location near and in protected areas is typical, which increases their use and threatens their ecological processes (Power, 1996; Howe *et al.*, 1997; Machlis and Field, 2000; UNESCO-MAB, 2005; Glass, Chapter 12; Thompson, Chapter 7, this volume).

Less common is denser clustering, usually occurring in the earlier phase of resort development. In addition, there are some amenity-led larger mountain urban areas, such as Baguio, Philippines (400,000 pop.); Grenoble, France (157,900 pop.); Santa Fe, USA (141,000 pop.); and San Antonio, Costa Rica, a piedmont community contiguous to the San José Metropolitan Area (2.3 million pop.).

Of strategic importance are the implications of this change for the special biophysical properties of mountains (see *Why a Mountain Focus for Amenity Migration?* above), and within this context, the impacts of the design and location of human-built environment on ecosystems and landscapes. Generally, settlement and residential buildings follow lowland standards, typically with no substantial reformulation for the special characteristics of mountain place, especially fragility and scarcity. There is also habitual excessive use of land, water and energy characteristic of the large 'trophy' homes and planned unit develop-

ments typically built for wealthier amenity migrants. This condition is often accompanied by soil, water and air quality degradation.

There are exceptions to this pattern, usually occurring recently, where municipalities or regional governments have been able to exert some ecologically informed control over new development (see Action Taken to Date). Particularly in Western Europe, often earlier built dwellings are renovated and used by the amenity seekers, and new developments tend to be dense and contiguous to existing settlements (Flognfeldt, Chapter 16; Perlik, Chapter 15, this volume).

Below is a partial list of the ecosystemic implications of the typical land conversion that takes place. It was initially developed for a policies issues brief and recommended strategic follow-up to the US\$6.5 million *The Sierra Nevada Ecosystem Project* (SNEP), 1996, report on the state of the Sierra Nevada mountain area of California and Nevada. It draws especially on Tim Duane's work in the SNEP report (Moss, 1999):

- reduced total habitat area through direct habitat conversion;
- reduced and isolated habitat patch size and increased fragmentation;
- harassment of wildlife;
- biological pollution from non-native vegetation;
- negative impacts on hydrologic regimes, such as:

- (a) increased impervious surfaces causing increased run-off of storm waters, heavy metals and oil;
- (b) increased risk of ground water and surface water contamination from septic sewer effluent; and
- (c) modified surface water flows from irrigation, septic systems effluent disposal and waste water discharges, along with decreased ground water flows to surface water systems due to pumping;
- sustainability problems for public lands, in particular from increasing and easier access to recreation and increased demand for local recreation and open space; and
- increased fire hazard in fragile Alpine ecosystems and increased demand for protection from this risk.

This situation is exacerbated by the construction and operation of the considerable new infrastructure that accompanies population growth: highways and local roads, water, waste and energy systems and recreation facilities for skiing, golfing, etc. (Jobes, 2000; Clifford, 2002; Johnson *et al.*, 2003; Lynch, Chapter 6; McMillan, Chapter 3, this volume). And there is also the high standards that resource-consuming and mass private-automobile-dependent societies, such as Australia, Canada, and the USA, expect and



Fig. 1.7. Trophy home in the Sangre de Cristo Mountains, Santa Fe, New Mexico, USA (photograph: L.A.G. Moss, January 2005).

demand. Which brings us more generally to the behavioural traits of mountain amenity migrants and their stewardship of natural amenities. Earlier I suggested they may be characterized as resource conservers and resource consumers, and that the latter predominated (Moss, 1994b). This characterization appears to remain appropriate today, and the norm it reflects is a principal challenge to sustaining the ecology of mountain areas, including their human communities. It is the Arcadian Myth, but with a late modern twist – ‘I’m going back to a rustic mountain ideal, and there I don’t have to control my consumption.’

Action Taken to Date

This last section offers an overview of action taken to address the mountain amenity migration challenge. Simply stated, there has been very little specific public action to address the opportunities and threats of amenity migration. Few local communities or regional entities have perceived amenity migration *per se*, and of those who have, even fewer have moved beyond understanding of this phenomenon to prescriptive action (Moss, 1994b, 2004a; Jobs, 2000; Johnson *et al.*, 2003; Chipeniuk, 2004; Chipeniuk, Chapter 11; Glorioso, Chapter 18, this volume). They typically advertise their special attributes, emphasizing amenity-rich locations for economic enterprise. At the same time, in an *ad hoc* and piecemeal manner some of amenity migration’s negative characteristics or symptoms have been identified and approached. But without the whole condition strategically understood and considered, successes have been partial and mainly inconsequential.

The private sector, especially real estate brokers and land developers, is myopically engaged in promoting and accommodating the amenity migrants, using a short-term, individual profit horizon (Moss, 1994b, 1999; Jobs, 2000; Chaverri, Chapter 13; Glorioso, Chapter 18; Glorioso and Moss, Chapter 5; Otero *et al.* Chapter 14, this volume). As I suggest above, mountain amenity migration is something of a caricature of the larger global condition, but within the mountain ecology it is exhibited particularly starkly.

Firmly limiting or stopping population growth, and its appropriate location, are the core

issues, but ones generally avoided. They are easy to avoid where the ‘hidden hand’ of the market and incremental, non-strategic decision making set the stage upon which ‘growth’ is generally equated with ‘progress,’ and progress with ‘good’. Having growth is understandably desirable to comparatively poor mountain communities and when these interests seem to converge with profit-seekers manipulating the amenities rush, it is difficult to argue against growth. Of crucial significance is a general lack of distinction being made between economic growth and development. Succinctly stated, *growth* is a quantitative increase in the physical dimensions of an economy by accretion or assimilation of material, while *development* is the qualitative improvement in the physical stocks of wealth that results from greater knowledge of technique and of purpose. ‘A growing economy gets bigger; a developing economy gets better’ (Day, 1990: 115). Given the prevailing cultural milieu, we have not had, and probably will not have, a no-growth strategy for mountain amenity migration, at least not in more than a few exceptional places, or unless a devastating post-oil scenario unfolds (Kunstler, 2005; Moss, Chapter 21, this volume).

The positive results of amenity migration have generally happened without particular guidance. Where attempts have been made to control the harmful effects, it typically has been done without the benefit of perceiving or using an amenity migration or similar strategic framework (Moss, 1994b, 2004a; Glorioso and Moss, Chapter 5, this volume). The principal means used to deal with growth has been traditional public land use planning. In addition some places, especially in western Canada and the USA, have applied promising newer tools for the conservation of natural environment and open space: conservation easements, protective zoning, land trusts, impact fees and density bonuses (Howe *et al.*, 1997; Porter, 1997; Moss, 1999; Esparza and Carruthers, 2000; Johnson *et al.*, 2003). Both the traditional and newer techniques attempt to control the amount, location and type of land use. But the latter seems seldom integrated and infrequently and poorly coordinated with the official public plans, mainly because of underdeveloped or unwanted collaboration among the techniques’ champions, particularly divided between official planning and citizens’ special interest action. The divide also stems from philosophical differences, as public

land use planning is commonly still not grounded in a land conservation ethic; it is not ecological planning. Within conservation action there is some integration of the newer tools, but, more generally, different stakeholders in the local or regional arena champion only one or several at a time. The general result to date is the winning of some local land use battles, but the war continues with its degradation of environmental and cultural amenities (Foreman, 1991; Moss, 1994b, 2004; Power, 1996; Howe *et al.*, 1997; Porter, 1997).

Human settlements planning, especially in the USA, has serious cultural and structural drawbacks for addressing amenity migration. It still has a very strong physical land use bias, despite almost half a century of awareness of the strategic need to integrate the physical, socio-cultural and economic aspects of community growth and development. Another important problem is its lack of a regional perspective and authority. Amenity migration opportunities and issues are commonly regional, but unlike in Western Europe and some other places, regional public planning is very weak or non-existent in the USA.

A critical weakness is the lack of an overarching strategic framework for controlling population growth, and more particularly amenity-led migration. But perhaps the greatest constraint is the underlying public planning trait of ratifying growth and development, not proactively managing them, and reliance on deterministic models. Generally, human settlements planning tradition is a significant part of the challenge to sustaining mountain amenities, particularly where its larger cultural context is hostile to governmental action, viewing it as intervention in the natural workings of the market and individual property rights – a common perspective in the New West of the USA.

‘Smart Growth’ is put forth by many public decision makers and planners, and some environmental conservationists, as the appropriate strategic framework for managing population growth in a manner that sustains the quality of the natural environment and the socio-cultural integrity of local communities. But critical examination reveals it is mostly the old suburbanization planning model for urban growth dressed up in new green-washed planner speak. Here is one succinct critique of the suburbanization model’s US urban product: ‘Today, these suburbs reveal the downside of 40 years of poorly managed growth:

Communities that once promised refuge from the ills of the city have been transformed into congested towns with clogged highway, burgeoning crime rates, and mile after mile of look-alike shopping malls, franchise architecture, and soulless housing tracts’ (Howe *et al.*, 1997: 1).

The same model that failed in the city is today being used with equal or worse results in still predominantly rural landscapes, including mountain ones, where it is even less suited than in cities (Howe *et al.*, 1997; Moss, 1999; Esparza and Carruthers, 2000; The Planners Report, 2005; Chaverri, Chapter 13; Glorioso and Moss, Chapter 5, this volume). Public decision making and planning in the Santa Fe bioregion exemplifies this failure (Glorioso and Moss, Chapter 5, this volume). In addition, San Antonio, Costa Rica is an example of its inappropriateness to the large city peripheral rural ecosystem (Chaverri, Chapter 13, this volume).

The ‘New Urbanism’ construct may offer more, as it espouses a comprehensive landscape approach and attempts to get at the cultural core of the problem of human settlement growth while sustaining the natural environment (Leccese and McCormick, 2000; Talen, 2002; The Planner’s Report, 2005). Strategic questions are how well is this model adapting to a rural landscape, especially fragile mountain ecosystems, and is it changing the dominant public human settlement planning culture? To my knowledge these are still unanswered questions.

Considerably more could be said even in an overview about the amenity migration phenomenon and its challenge to mountain ecologies. The latter is pursued further in the concluding chapter of this book, but here I will close with several further observations about a crucial stakeholder group – the amenity migrants. As described above, they are not a single entity and their wants and needs are a complex mixture that change not infrequently and are variously represented both individually and through special interest groups. Commonly, however, they bring into the mountains, and attempt to maintain, the values and behavioural traits of their metropolitan origins. If a continuum of environmental concern were drawn they would be arrayed along it from ‘generally aware’ to ‘committed activism’ (Moss, 2004a). In the cultural realm, the different, especially if it is deemed aesthetically attractive, is

generally valued but poorly understood, and can easily become suspect, especially if associated with competition for economic gain.

Mountain amenity migrants, particularly the more permanent type, are involved in protecting and conserving the natural environment, although these appear a small minority. Also, few act to sustain cultural amenities, and typically those who do focus on the material artefact, such as Pueblo Indian pottery and jewellery traditions, rather than indigenous peoples' problems of political empowerment, water rights and the like. Amenity migrants have had successes in these endeavours, but in sum have not succeeded in

arresting their own degradation of the amenities that attract them to the mountains.

Much more can be done to reverse our destruction of mountain ecologies and their human communities. Likely to be most significant are: change in key societal values, principally to stop the adaptation we are imposing on the mountain biosphere; innovative and firmly enforced governance for sustainable mountain land use; and further mountain migration research – all within a management paradigm that focuses on local communities in a bioregional context. In addition, large cities must improve their livability, and so become more attractive to their citizens.

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2 The Spiritual Dimension of Moving to the Mountains

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There is a spiritual dimension to many people's choice to move to live among mountains. Though such an assertion is easy to make, it is difficult to prove by precise and rational means. Spirituality is an essential part of human existence. But it is elusive by its very nature. Thus, when we inquire into the contribution of spirituality to amenity migration to mountains, we are to a degree searching for something hidden behind the ranges (to paraphrase Rudyard Kipling's great mountain poem, *The Explorer*).

There are some means of analysis available that offer a glimpse of the motivating force of spirituality in human migration to mountains. First, we can ask what is meant by spirituality to see if we can give the concept some shape. Second, we can examine various cultures to see if mountains provide some spiritual dimension to human life. And finally, we can ask if there is any evidence, direct or circumstantial, that these things are causing some people to relocate to mountains at this time in human history. This three-tiered approach can provide some evidence of a phenomenon that is real but that ultimately cannot be fully proved through the scientific method.

The Meaning of Spirituality

Many writers use the word spirituality and then move on to make their point without bothering to define it. It is easy to understand why. Spir-

itality can be the realm of the great organized religions or the domain of the solitary seeker of the meaning of life. Its expression is infinite. No one owns the concept. Yet its presence gives fullness to life in a way that tangible things never can.

The definition of the word 'spiritual' in the *Oxford Dictionary of Canadian English* (1998: 1401) includes: (i) of or relating to the human spirit or soul; not of physical things; (ii) concerned with sacred or religious things; holy; divine; inspired (the spiritual life). An older American dictionary, *Funk and Wagnalls' Practical Standard Dictionary* (1930: 1089), defines 'spirituality' as 'the state of being spiritual' and defines 'spiritual' as: (i) of or pertaining to spirit as distinguished from matter...(ii) pertaining to or affecting the immaterial nature or soul of man...(v) marked or characterized by the highest qualities of the human mind'.

These definitions seem a little wanting when one is contemplating the non-physical nature of human experience in the mountains. They do not quite capture the essence of a feeling that many people who love the mountain experience. Mindful of the admonition that 'fools rush in where angels fear to tread', here is an effort to define the spirituality of mountains more fully: the public or private practice of an opening of the heart to the intangible but omnipresent goodness of the Creator, or the universe, that gives to the individual, as the need may be, internal joy, contentment, solace, acceptance, a feeling of

being in harmony with the universe, a sense of purpose beyond the acquisition of material comforts or a feeling of belonging that is not dependent on the approbation of other people.

Like beauty, love and money, spirituality is very hard to define. Yet no one would deny the importance or potency of beauty, love and money as forces in human motivation.

Do Mountains Generate a Spiritual Response in People?

As places of spiritual activity including pilgrimage, inspiration and reflective practices, as well as for overcoming personal limitations, mountains are disproportionately significant compared to other landforms. They also figure prominently (though not exclusively) in important cultural origin stories of many people. Larry Hamilton and Linda McMillan (2004) have written that many mountains possess metaphysical significance which involves sacredness, fear, ceremony, history, pilgrimage or mystique.

However, mountains do not have spiritual meaning for everyone. When I was a young man living on a Prairie ranch on the edge of the Canadian Rockies, our foreman once said to me 'God had a hangover when he made the mountains.' He avoided the nearby Rockies at all costs. I have also heard other people express feelings of oppression and an uncomfortable sense of being confined in mountain environments. These modern people echo the feeling of many western Europeans before the Romantic period, who experienced the Alps' chaotic landforms as offensive to their sense of harmony (Milne and Milne, 1962). When Scottish botanist David Douglas first saw the Canadian Rockies from the Big Bend of the Columbia River in 1827, he wrote that the scene 'impresses on the mind a feeling beyond what I can express. I would say a feeling of horror' (in Brown, 2002: 145). Even more negative views were held into the 1880s, by Swiss mountain guides who feared being attacked by satanic powers on the Furgenn Ridge of the Matterhorn (Blakeney, 1979). But for many people in many cultures, mountains are places of special reverence. They certainly are for me.

Canada's first commissioner of National Parks and the creator of the world's first park service, J.B. Harkin, openly expressed a spiritual response to mountains: 'Let our mountain parks, at least, continue to offer challenge to hardihood and courage. In these silent wildernesses there are "holy places"' (Harkin, 1957: 12). Canadian geologist and explorer A.P. Coleman wrote 'There is a cleanness and virginity, an exquisite loneliness about many Rocky Mountain peaks and valleys... There is a feeling of having caught Nature unawares at her work of creation' (in Harkin, 1957: 14). One of Canada's legendary Group of Seven, painter Lawren Harris, depicted Mount Lefroy overtopped with clouds that pulse skyward in a manifestly spiritual painting that has become one of his most widely reproduced works. For the Blackfoot First Nation, Chief Mountain is the home of Thunder, and Crownsnest Mountain, the home of Raven (see Fig 2.1). A battle between those mountain dwellers resulted in the division of the year into summer and winter. The summits of both peaks are revered as the sites of dream beds where vision quests take place (Blackfoot Gallery Committee, 2001). For the Deh Cho Dene, the mountainous South Nahanni watershed is the setting of their basic cosmological stories (H. Norwegian, Banff, Alberta, 2004, personal communication). Stoney Chief John Snow wrote a book entitled *These Mountains are our Sacred Places* (Snow, 1977) about his people's homeland in the Canadian Rockies, west of Calgary.

American John Muir urged people to spend time in the Biter Root area of the Rocky Mountains for 'Thousands of God's wild blessings will search you and soak you as if you were a sponge', and described the mountains of what would become Glacier National Park as 'care-killing scenery' (Muir, 1992: 465). His countryman, James Ramsay Ullman (1970) wrote *And Not to Yield*, a novel about the restoration of a shattered human soul through climbing mountains. And in his encyclopedic work on the world's mountains, Ullman (1954: 320) said 'Over and above all else, the story of mountaineering is the story of faith and affirmation... Mountaineering is more than a sport, more than conquest. And it is more than adventure too...(it is) part of a profound experience of the human spirit'. Perhaps the most famous American photograph of the 19th century was William



Fig. 2.1. Crowsnest Mountain, Canadian Rockies. For the Blackfoot First Nation its summit is a place for vision quests (photograph: H. Locke, February 1996).

Henry Jackson's image of the Mountain of the Holy Cross in the Colorado Rockies (Waitley, 1999; Weber, 1993). The overtly religious symbolism of a vertical crack intersecting a horizontal crack outlined by snow became a site of pilgrimage (Scott, 2002). Singer-songwriter John Denver's *Rocky Mountain High* (1972) was a large commercial success. It described a young man, who at 27 was 'coming home to a place he'd never been before...you might say he was born again'. The Confederated Kootenai Salish Tribes of Montana protected the Mission Mountains Tribal Wilderness on the Flathead Reservation because the mountains are sacred to them (Tanner, 2004).

In Europe, there are many examples that demonstrate humanity's spiritual response to mountains. *The miraculous draught of fishes* by Conrad Witz is a Swiss painting from the 15th century which depicts Jesus in Lake Lemman with the Alps plainly visible behind. It is noteworthy that there is a manifestly spiritual component to this painting, which is the first from western civilization in which specific mountains are plainly identifiable as opposed to serving merely as a non-specific compositional backdrop. Four hundred years later, British art critic John Ruskin said of painting the Swiss landscape that in

mountain scenery there is 'a fountain of feeling yet unopened, a chord of harmony yet untouched by art. It will be struck by the first man who can separate what is national, in Switzerland, from what is ideal. We do not want chalets and three-legged stools, cow-bells and buttermilk. We want pure and holy hills, treated as a link between heaven and earth.' (in Russell and Wilton, 1976: 16). English painter J.M.W. Turner's *The Avalanche in the Grisons* pulses with an abstract expression of the sublime and otherworldly power of mountains (Wilton, 1980). It is among the first western canvasses to use primal colour to express primal power and provide an impression of mountains as opposed to a representation of them. In describing the best-known climbing accident of all time, Edward Whymper reported seeing a vision of crosses in the clouds after the tragic fatal accident which followed his party's triumph in reaching the summit of the Matterhorn. Many mountain tops in Europe are adorned by crosses placed there by devout Christians, and there are religious buildings set in prominent high points throughout the mountains of Europe, such as the ancient churches above the small city of Sion, Switzerland and the church complex on the top of Mont Saint Michel in France.

Spiritual engagement with mountains is not unique to the western world. Across Asia, mountains have had deep spiritual significance for a very long time. In Japan, Mount Fuji is the Shinto Goddess of Flowering Trees, and is revered by Buddhists as a place of sublime power and meditation (Hamilton and McMillan, 2004). Japanese people make pilgrimages to its summit in the same way that Muslims visit Mecca (Milne and Milne, 1962). In China, the Jade Dragon Snow Mountains are sacred to the Naxi people. In Nepal, Gauri Shanker Peak, which embodies the Hindu Lord Shanker and his consort Gauri, is considered sacred and off limits to mountaineers (Hamilton and McMillan, 2004). The flat summit of Samanahela or Adam's Peak, in Sri Lanka, bears what appears to be a giant footprint, which has been interpreted by Muslims as Adam's footprint, Christians as the footprint of St Thomas the Apostle, and, before them, Buddhists considered it to be the footprint of the Buddha and Hindus believed it was the imprint of Shiva (Blakeney, 1979; Molyneaux and Vitebsky, 2000). In the Himalayas, Mount Kailash (also known as Kailas or Kailasa) is revered by Hindus, Buddhists and followers of Bon Po (Molyneaux and Vitebsky, 2000). In Buddhist tradition, Gautama went to dwell there after death so as to continue to be of help to mankind. The *parikrama* or circuit of that remote peak is thought by Buddhists to cancel past sins. For Hindus the peak has much significance. Mount Kailash is the handle by which Brahma lowered the earth from heaven and the birth-place of Shiva (Blakeney, 1979).

Asian religious architecture often seeks to represent or work with the spiritual qualities of mountains. Through the Feng Shue tradition in China, temples of both Taoists and Buddhists were set among mountains and waterfalls, as these landforms were considered to have energy conducive to spiritual practice (Fisher and Luyster, 1991). The Buddhist stupa, a dome-shaped mound built in many places across Asia, has a complex meaning which includes that the stupa is a symbolic mountain and represents nirvana (Molyneaux and Vitebsky, 2000). In Mesopotamia, the ziggurat with its corkscrew shape winding up to the sky represents moun-

tains and the bond between heaven and earth (Moynihan, 1979).

There are examples from other parts of the world as well. Edwin Bernbaum's thorough *Sacred Mountains of the World* (1997) is devoted to the spiritual impact of mountains on people everywhere. Hamilton and McMillan (2004) note that in Venezuela, the central range of mountains is to the local people 'la Sorte de Maria Lionza', the sacred place of the goddess of nature. In New Zealand, the volcano Ngauruhoe is an ancestor to the Maori and its fire was lit by the gods. On a 2003 trip in the Drakensberg Mountains of South Africa, our Zulu guide indicated a sacred peak in the distance with his fist, explaining that it was forbidden to point at it.

When considering the spiritual impact of mountains on people, it is important to note that the spirituality has two dimensions. There is the human spiritual response to mountains. But some also describe something more: a phenomenon that originates in the mountains, which in essence involves transmissions of spiritual force from mountains to people. J.B. Harkin described it this way: 'People sometimes accuse me of being a bit of a mystic about the influences of the mountains. Perhaps I am. I devoutly believe there are emanations from them, intangible but very real, which elevate the mind and purify the spirit' (Harkin, 1957: 12–13). Johan Dormaar (2003) writes of the Blackfoot, who used inanimate nouns to describe some hills and an animate noun to describe the Sweetgrass Hills, an isolated mountain range which rises 1000 m above the great plains of the Canada–US borderlands. In essence, the Blackfoot treated the Sweetgrass Hills linguistically as if they possessed life, so great was their spiritual power.

Is there Evidence that Spirituality is a Factor in Migration to Mountains at this Time in History?

The above are but a few samples from the avalanche of evidence that many people have a spiritual response to mountains. But you can go to church without living in a church. So the bare fact that mountains generate a spiritual response

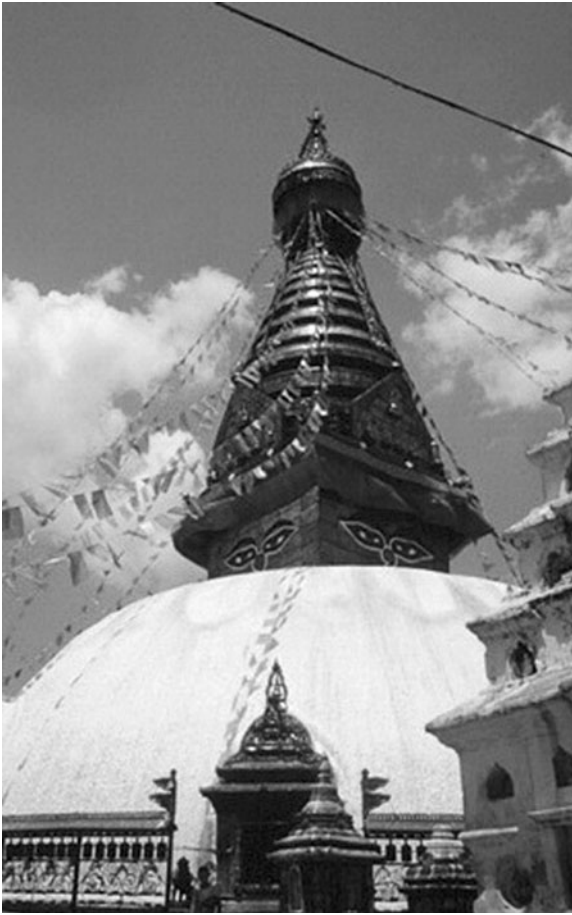


Fig. 2.2. Bodhi Tree Stupa, a symbolic mountain representing *Nirvana*, near Kathmandu, Nepal (photograph: B. Locke Geier, May 1984).

does not fully answer whether this spiritual response is part of the impulse for people to move to mountain environments and leave behind the benefits of coastline or plain.

In 1962, Milne and Milne wrote: ‘it might appear that when free to choose, and with the possibilities of self-advancement before them, men will tap the wealth of the mountains — their minerals, their waters, their forests, their possibilities for tourism — but they will not live there. This seems to be true for such new lands as the American West, the Canadian Rockies, and the New Zealand Alps’ (Milne and Milne, 1962: 129–130). We can examine that assessment in light of current conditions.

Today in 2005, some mountain areas have been depopulating. Many villages have been

abandoned in the mountains of Europe over the last 50 years. Mining and logging towns in the North American west are experiencing economic and population decline. Yet, in what might seem a paradox, some mountain communities in those same areas are growing rapidly. Notably this migration to mountains is occurring in those places where Nature is treated as worthy of protection (and thus more suited to spiritual activity), as opposed to merely a staging point for resource extraction. In the American west, Ray Rasker and colleagues (Rasker *et al.*, 2004) have studied the two different kinds of communities and their relative prosperity. They observe that there is an inverse relationship between dependency on resource extraction and economic growth. Their study also indicates that the

presence of mountains is important for economic growth and that the influx of newcomers is closely tied to economic growth. Protected areas of public land are also important to such migration. The closer the protected lands or the more public lands that are immediately adjacent to protected lands a county has, the faster the economic growth (Rasker *et al.*, 2004). It is worth noting that this economically important migration to mountains is occurring in the very places that Milne and Milne said people would not live, 40 years ago.

The explanation for the apparent contradiction in trends in mountain migration lies in the motivation of the migrants. Those who have been in the mountains for primarily utilitarian reasons are now drawn away by the faster pace of cities and the urbanization of economic opportunity. They can meet their material goals better in places with higher population densities. On the other hand, for those who have already benefited from those economic opportunities or who attach less importance to them, there is often something lacking from their existence in urban environments. People need their lives to be about more than getting and spending for their existence to be meaningful and satisfying. Some people can find that meaning in cities through worshipping in churches and temples or through other lines of spiritual pursuit. For others not drawn to or fulfilled by those practices, cities may have fabulous amenities but they have no soul. Mountains touch the spirit. Spending more time in the presence of mountains by living in them is a way that amenity migrants seek to enhance the spiritual dimension of their lives.

There is some objective evidence to support this. Case studies of amenity migration to mountain communities undertaken by Romella Glorioso and Laurence Moss in different regions of the world included interviews about the motivations of these migrants (Moss, 1994 and Chapter 1; Glorioso, 2001 and Chapter 20, this volume). In three of the four mountain places studied (Baguio, Philippines; Chiang Mai, Thailand; and Santa Fe, New Mexico), many such migrants clearly indicated that the spiritual attraction of the mountains was a key factor in their decision to move to these places. To confirm that spirituality is an operative factor in amenity migration to other mountain regions that are experiencing a lot of it, I did an anecdotal survey over the course of 3 months in the summer of 2004.

The study group were migrants to two mountainous regions of North America: Yellowstone to Yukon and the Colorado Rockies. My knowledge of the people varied from intimate to new acquaintance. These people frequently confirmed that they feel a spiritual connection to the mountains they have chosen to live by and they are usually not churchgoers. Mention of their spiritual relationship to mountains was often unprompted and came up frequently once I started listening for it. Here is a sample from that anecdotal survey:

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- At age 14, on a family trip across Canada that originated from a central Canadian city, the girl who would become my wife first saw the mountains of Banff National Park and felt a power from them. From that point, she knew with certainty that she would come to live near the mountains and did. An almost identical story was told by a middle-aged woman friend from the Canadian Prairies, who moved to be close to the mountains. She called the mountains her 'cathedral'.
- A close friend moved many years ago from Ottawa to Calgary to be close to the mountains. He took days off to join us in the mountains of Yoho National Park, telling his employer that he was taking a 'three-day spiritual retreat'.
- A new friend from Aspen took me hiking on a Sunday morning with two of his friends previously unknown to me. They were all migrants to that town from different places in the USA. High in the mountains of White River National Forest he said casually 'these mountains are my cathedral'. The others said they shared that sentiment.
- A couple who are new friends moved separately from Minnesota to Jackson Hole many years ago. They took us backpacking in Wyoming's Wind River Range. In camp, he read from the Tao Te Ching because he considered it a spiritual setting. Another new friend originally from Michigan, who I met on that trip, initially moved to Wyoming for work. He left that job but stayed in Jackson Hole because he fell in love with the mountains. He had brought an excerpt from Edward Bernbaum's *Sacred Mountains of the World* (1997)

to share and intends to write about the spirituality of mountains.

- A colleague who moved from Wisconsin to British Columbia 30 years ago feels unwell if he spends too much time in non-mountainous country, only to have his spirit and health restored when he returns.
- A colleague from New York who now divides her time between that city and Jackson Hole told me with misty eyes that it is the spiritual dimension of the mountains that moves her to devote a significant part of her life to protecting them.
- A friend from Maryland moved to Montana to live among the mountains and work to protect them, because there was ‘something innate and an inner peace I feel in them.’
- An economist friend originally from Mexico City, who moved to Montana to live among the mountains, and who now studies amenity migration, told me of people describing the lower pay they earn in order to live in the mountains as being offset by the ‘paycheque from God’.

My story is different. My parents grew up in Banff in the Canadian Rockies. My father went overseas in the Second World War and then won a gold medal in dentistry at a prestigious eastern North American university, located in a city with tremendous economic opportunities. Despite the economic opportunities in Montreal, my parents

moved back to the then small city of Calgary on the edge of the Canadian Rockies, as there was never any question that they would live anywhere but close to the mountains.

The Rockies were spoken of in my home with reverence (Locke, 1999, 2000). We spent much of our free time in them. My father’s ashes are sprinkled in the Rockies as he wished. My mother now lives in Banff again. As an adult, I have devoted much of my life to protecting them, from Yellowstone to the Yukon. Ironically, for reasons of personal growth, opportunity and family I now live in a big city, far away from mountains, though protecting them is still the focus of my work. But this intellectual engagement with mountains is not enough. I yearn for them daily and though it involves an enormous amount of travel, I visit them monthly, for I derive spiritual sustenance from mountains. And like Harkin, I receive their power. I am a diminished human without them. My wife and I have organized our lives to migrate back to live in them. Thus, I can offer personal testimony to the spiritual impulse of the amenity migrant.

Spirituality is an essential aspect of a complete human existence. It is an important factor in amenity migration to areas near protected mountain environments. Those who move to mountains seek to restore or reaffirm their desire to live meaningful lives in a setting that lifts their souls and makes them feel good.

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3 Guiding Back from the Precipice: Leveraging the Power of Recreational Users to Protect Mountain Environments

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A people who climb the ridges and sleep under the stars in high mountain meadows, who enter the forest and scale peaks, who explore glaciers and walk ridges buried deep in snow – these people will give their country some of the indomitable spirit of the mountains.

The late US Supreme Court Justice and mountain recreationist, William O. Douglas (1898–1980)

Humans have always been drawn to mountains for the solitude, bounty and beauty they offer. But the nature of human recreational activity in the mountains has changed dramatically in the last century, as has the resulting environmental impact. An explosion in the magnitude and pace of this change began shortly after the Second World War, as rising disposable incomes and leisure time for workers converged with improvements in access, convenience and comfort in the mountains. Population growth, improved health, longer life-spans and a contemporary focus on ‘quality of life’ issues have all served as accelerators to this process. A growing wave of amenity migrants is now drawn to mountain areas for the many recreational opportunities they offer.

While most observers readily see the negative results, many are unaware of the valuable opportunities for positive results that are also embedded in this wave. Such opportunities are illuminated in this chapter, which considers the ‘recreation’ part of the broader ‘leisure motivator’ for amenity migration (AM). It begins with an overview of the similarities and differences

that exist among the three general recreational user (RU) groups, based on their regard for the natural environment and their behaviour. Next, the various roles that RUs play in AM are described, with a comparison of their perspectives and concerns about AM, and some of the broader social, economic and political influences driving it. In conclusion, examples are given of how land managers, public officials, planners and communities can leverage the growing economic and political clout that RU groups now have to preserve and protect mountain areas from the negative impacts of AM. Thus, by understanding the important recreational user components of the amenity migration ‘wave’, decision makers will be better able to harness its potential to produce more positive results in mountain areas.

Mountain Recreation Users and the Outdoor Recreation Industry

Outdoor recreation is a fast-growing multi-billion-dollar economic force in today’s global economy. In fact, the growth of recreation on public lands represents a major shift in societies’ priority for public land use around the world, from a focus on the extraction and sale of natural resources to the preservation and enjoyment of them. For example, the US Forest Service has now become the world’s largest single supplier of outdoor recreation. Annually, over a billion visits to

America's national forests and grasslands represent almost 50% of all recreation visits to the nation's public lands. In the USA, approximately 85% of the revenue generated from national forests now comes from recreational activities – more than five times the amount generated by the timber harvest. Currently, US parks and forests, including 23.4 million roadless hectares, provide an estimated US\$100 billion dollars in economic benefits from recreation and nearly 333,000 jobs annually (Dombeck, 1998a). This trend is predicted to accelerate and the US Forest Service, National Park Service, Bureau of Land Management and other land agencies now realize they can no longer manage their lands effectively without the active help of recreational stakeholder groups.

The societal shift toward more recreational enjoyment of mountain areas presents both a looming challenge and an important opportunity. The challenge faced is that as mountain recreation becomes more popular, it will tend to create even more amenity migrants and their resultant impacts on mountain environments. As living in mountain areas becomes more comfortable and convenient, this tendency will increase. The important opportunity this presents is for land managers and community leaders to tap into the burgeoning economic and political influence of this stakeholder group and engage them in helping to ensure the long-term protection of mountain areas.

Who are today's RUs? The three basic groups

The way people recreate in mountain areas has changed dramatically since the mid-20th century. Extremely popular new mountain sports continue to emerge, often from older traditional ones. The phenomenal growth of 'bouldering', where boulders or short vertical distances are climbed without the usual supports, is the fastest-growing variation of technical rock climbing. Another example is snowboarding, the fastest-growing variation of snow skiing. Despite this growing recreational diversity, mountain RUs can generally be categorized into three broad groups that have evolved as a progression over time: *traditional recreation*, *non-traditional recreation* and *motorized recreation*. Each group tends to exhibit a unique

culture and worldview: expectations of comfort and convenience, perspectives on the use of mountain resources, general attitudes toward the mountain environment and tendencies to become amenity migrants.

Pre-1950s – traditional RUs

Before the mid-20th century, mountain recreation consisted of activities and sports that evolved out of the traditional outdoor survival skills needed to travel and live in the mountains. Reflecting these roots, today's traditional mountain recreational users pursue non-motorized sports such as hiking, backpacking, mountaineering, rock climbing, horseback riding, cross-country skiing, fly fishing, hunting, snowshoeing, swimming, canoeing, sailing and road bicycling. Since traditional recreationists place a much higher value on the pleasures of being in remote, pristine and primitive conditions in roadless areas far away from civilization, expectations for comfort and convenience are low. Because of their high regard for the experience of simply 'being in the mountains', many pursue a variety of traditional sports year-round in mountain areas.

Post-1950s – the emergence of non-traditional RUs

This traditional concept of mountain recreation changed dramatically in the 1950s and 60s, as swelling ranks of urban and suburban dwellers began to take advantage of improved access to mountain areas provided by massive highway and other road construction, particularly in the developed world. Increased mobility, coupled with rising disposable incomes and more leisure time, offered opportunities for mountain recreation to those who might live far from mountain areas. This, coupled with advancements in safer equipment designs, plastics and other strong, lightweight materials, sparked growth in traditional mountain recreation and fostered the emergence of non-traditional mountain recreation, such as white-water kayaking, river rafting, off-road bicycling and lift-served skiing and snowboarding. In comparison to traditional sports, these non-traditional sports are usually pursued closer to towns and roads, so enjoyment of them

does not particularly require a thorough knowledge of outdoor 'survival skills'. Because these sports are less oriented toward quiet contemplation of pristine mountain scenery than to 'the thrill of the ride', non-traditional recreationists are more likely than traditional recreationists to seek and expect comfort and convenience in mountain amenities. Taking advantage of these expectations, a growing number of mountain resorts offer increasingly upscale amenities to *aficionados* of snow sports like lift-served skiing and snowboarding. Since some of these non-traditional sports are dependent on seasonal river flows and ski-lift operating schedules, they are often pursued on an intermittent or seasonal, rather than year-round, basis in mountain areas.

Late 20th century – 'motorized sports' as recreation

During the late 20th century, 'motorized sports' emerged as less physically rigorous alternatives to traditional and non-traditional sports. Riding the coat tails of the new wave of fast-paced non-traditional mountain sports, such as off-road bicycling, white-water kayaking, and lift-served skiing, 'motorized sports' were increasingly perceived as – and heavily marketed by equipment manufacturers as – 'recreation'. Hence, people were encouraged to visit the mountains to drive their all-terrain vehicles (ATVs), snowmachines, off-road motorcycles and other types of off-road vehicles (ORVs), or to enjoy motorized water sports such as water skiing, motor boating, motorized fishing and riding jet skis and other personal watercraft. These 'sports' rely much less on participants' physical fitness and outdoor skills than either traditional or non-traditional mountain sports, so they appeal to a broad spectrum of participants, particularly older adults. The speed and ease of these sports offer participants a feeling of exploration, adventure and 'getting away from it all' with a relatively small investment of time and physical exertion. Like non-traditional recreation, motorized recreation is less oriented toward quiet contemplation of the mountain scenery than to 'the thrill of the ride'. Catering to the expectations of motorized RUs, equipment for these 'sports' tends to focus on providing ever more speed, power, comfort and convenience for riders. Except for the use of snowmachines and some motorized watercraft, motorized recreation

activities are often pursued year-round in many mountain areas.

How do RU groups' perspectives compare, contrast and relate?

Today, most recreational users of mountain areas are not long-established local residents, but rather urban or peri-urban dwellers from lowland metro centres, often hours away from mountains. As home prices rise and the quality of life declines in many of these areas, recreationists are migrating to the mountains to enjoy their life-enhancing amenities on a permanent, seasonal or intermittent basis (Moss, 1994, 2004). Though some might be tempted to categorize all RUs as part of the problem of amenity migration in mountain areas, this would ignore the important fact that traditional mountain recreation historically spawned the world's leading environmental icons, such as mountaineers John Muir, Theodore Roosevelt, David Brower and Yvon Chouinard. Because of their deeper sense of attachment to unspoiled mountain environments, traditional RUs have a long track record of proactive efforts to protect them. Many have shown a natural impulse toward resource stewardship and a willingness to create, join or fund organized efforts to achieve this. Traditional RUs remain a key part of the vanguard in environmental protection, and have proven themselves to be eloquent, passionate and politically active mountain advocates.

Given these role models, how can environmentally sensitive RUs be effectively engaged in helping to be part of the solution to the negative impacts of amenity migration, rather than part of the problem? How might traditional RU activists be used to generate a deeper sense of mountain stewardship in the other RU groups? To accomplish this, one needs an understanding of how the various groups of recreational users relate to each other, how they compare and contrast, and how their perspectives and concerns drive their behaviours.

Traditional versus non-traditional RUs

Usually regarded as the 'rugged adventurers' of mountain recreation, traditional RUs often are introduced to these sports by family, friends, on



Fig. 3.1. All-terrain vehicles in Inyo National Forest, Sierra Nevada Mountains, California, USA (photograph: S. Justham, US BLM, July 2004).

scouting or on guided trips. Many are also inspired to take up these sports after reading exciting stories and books describing them and the adventures to be had in the outdoors. A large part of the adventure of traditional mountain recreation comes from the challenges of learning the special techniques and equipment of these sports, and acquiring the outdoor survival skills needed to feel competent and secure while removed from the safety and comforts of civilization. As a result, traditional RUs tend to gain a deeper knowledge of, and respect for, the natural world, and a close, lasting connection to it – physically, intellectually and spiritually. Motivated by this deep sense of respect for the environment, traditional RUs are generally more likely than the other groups to recognize and try to proactively mitigate their negative impacts on mountain areas, including those associated with amenity migration. Many have a natural impulse toward resource stewardship and a willingness to join or create organized efforts to achieve this, as previously mentioned.

Although well-honed techniques and skills are certainly needed in most non-traditional mountain sports, these recreationists generally do not need to have extensive outdoor survivor skills to enjoy their sports, as they are generally pursued in less remote areas than many traditional sports. Consequently, non-traditional RUs can have a less developed knowledge of, and connection to, the mountain environment than traditional RUs.

Because of this, they can be less aware of their overall impacts on mountain environments, and less likely to proactively respond to them. However, sports that are typically enjoyed on public lands, such as mountain biking, lift-served skiing and snowboarding, kayaking and river rafting have had to be mindful of their potential loss of access to these lands if they neglect the negative impacts of their sports. Some non-traditional sports such as mountain biking, lift-served skiing, kayaking and rafting have created representative organizations and club networks that have now developed and published suggested guidelines for participants to mitigate their negative impacts, promote mountain stewardship and teach resource conservation to their participants. Examples of these types of sport advocacy and stewardship groups include the International Mountain Bicycling Association, American Whitewater, National Ski Areas Association, Ski Area Citizens' Coalition and the Appalachian Mountain Club.

Motorized versus non-motorized RUs

The mobility, comfort, speed and convenience that 'motorized sports' offer can easily lull participants into ignoring the natural hazards of being in the mountains and the environmental impact their sports can cause. As a result, those who pursue motorized recreation may have little or no background in either outdoor survival skills or

awareness of the fragility of mountain environments. Enjoyment of these sports is often directly related to the unspoiled character and geographic range of areas available for motorized recreation, with wider and more topographically and biologically diverse areas preferred to smaller, less diverse ones. As the popularity of motorized recreation has spread, so too has the potential for destruction that these sports can cause in mountain environments: increased soil erosion, vegetation damage and significant air, water and noise pollution. Unfortunately, even in areas where public land managers have completed or begun site-specific ORV management plans to resolve these problems, ORV use may continue unrestricted, due to the lack of staff and resources needed to monitor vast expanses of public domain. In such areas, resource degradation caused by ORV use can continue and accelerate (Society for Range Management, 2004). Unauthorized ORV-user-created trails in these areas can fragment fish and wildlife habitats, damage riparian areas, degrade water quality and disturb natural landscapes by causing ruts and tracks (Lawler, 2000).

In contrast to motorized recreation, non-motorized or 'human-powered' recreation usually requires participants to develop some level of outdoor survival skills and awareness of natural hazards to remain comfortable and safe. At a human-powered pace, negative impacts on the mountain environment are more easily noticed and pondered. Enjoyment of these activities is often directly related to the sense of peace, quiet and solitude available in the recreation area. As the popularity of non-motorized sports has spread, its participants have increasingly become aware of, and concerned about, negative impacts on mountain environments, from their sports as well as from others. They have acquired a generally stronger sense of self-identity, established organizations to promote the core values of their sports and developed awareness of their economic and political power.

Consequently, high-profile conflicts have now begun to occur in some areas between motorized and non-motorized sports enthusiasts, where the core values of each group's recreational experiences are threatened. A famous example in the USA is in the Yellowstone National Park, where non-motorized recreation

groups have aggressively lobbied to sharply restrict the activities of snowmachiners in order to preserve their experience of peace and solitude in the outdoors. In response, snowmachiners have lobbied against such restrictions in these areas, claiming that snowmobiles can only be ridden in the Park on the same groomed roads used by cars, buses and trucks in the summer, and represent only 4% of all annual visitations to Yellowstone (Klim, 2004).

It is important to remember that there are no hard boundaries between the three general groups of RUs, and that many individuals may actively pursue sports in each of the groups. For example, avid backpackers might also be mountain bikers, kayakers and off-road vehicle enthusiasts. Cutting across the three groups, however, one can see notably greater contrasts in cultures, perceptions and actions when comparing non-motorized versus motorized recreationists, than comparing traditional and non-traditional recreationists. In general, there tend to be closer affiliations and collaborations between traditional and non-traditional RUs, than between motorized recreationists and non-motorized recreationists. Such a contrast is understandable given that non-motorized recreationists tend to recreate in mountains to enjoy their peacefulness, unspoiled landscapes or solitude, and so tend to favour roadless policies or limitations on vehicular access. In comparison, those who enjoy motorized sports are comfortable with the noise, air and water pollution and the crowding sometimes associated with their sports, and favour greater vehicular access in mountain areas. This natural contrast may lead to increasing confrontations between the two groups in areas where motorized sports cause direct negative impacts on non-motorized recreation users, as in the Yellowstone example above.

However, there can also be significant conflicts between traditional and non-traditional recreationists. Increasingly, managers of public lands (whether city, state, provincial or national parks or regional open spaces) are faced with nettlesome conflicts between these RUs over the shared use of trails. Typically, these conflicts involve hikers and equestrians fearing for their safety on trails where mountain bikers enjoy riding at high speeds. There can also be conflicts among RUs of the same group. For instance, a growing number of hikers and backpackers are

complaining to public land managers about the negative impacts – dust, manure, trail degradation and trampling of meadows – by horses used for riding and as pack animals on backcountry trails.

How much is enough? Attitudes and behavioural differences among groups

The combined forces of economic and social change, crowding in metro areas, ageing of populations, rising rates of participation in outdoor activities and effective marketing campaigns by equipment manufacturers are all factors attracting more RUs to mountain areas as visitors and amenity migrants. But impacts from AM can vary greatly among recreational groups. When recreationists choose to become amenity migrants, what are their attitudes and manifested behavioural differences, and how do these translate to impacts on mountain areas?

Attitudes and behaviours of traditional RUs

Compared with the other recreational groups, traditional recreationists tend to arrive in the mountains with a deeper understanding and concern about the environment and their impact on it. As previously mentioned, their history and culture include icons of mountain protection and preservation. In general, traditional RUs tend to be resource conservers, comfortable with modest homes with simple amenities. Since their sports require little or no human infrastructure (in contrast to downhill skiing or golf), they seem less attracted by real estate prospects near resorts and towns than by other, more rustic and remote properties. In contrast to other groups, they also tend to be more willing to help local communities and planners with mountain protection efforts and curbs on unrestricted development of mountain areas. With a strong focus on the unspoiled recreational potential of an area, they are more likely to harbour a long-term perspective toward mountain protection.

Attitudes and behaviours of non-traditional RUs

Migrants who are non-traditional RUs often have been drawn to the mountains for their seasonal

recreation amenities, the potential of real estate investments or both. Arriving with generally less knowledge of mountain environments, they tend to be resource consumers, rather than resource conservers, and may be unaware, marginally aware or unconcerned about their environmental impact. If they are migrating to take advantage of speculative short-term real estate appreciation, their perspectives toward mountain protection, resource utilization, and community integration can also be more short term, pro-consumption and self-focused rather than long term, pro-preservation and group-focused in nature. In comparison to traditional or motorized recreationists, many non-traditional RUs (particularly downhill skiers and golfers) are attracted to properties at or close to ski resorts, golf communities and planned developments that may offer a variety of amenities such as swimming pools, equestrian centres, tennis courts, community centres and snow removal services. These tend to be more upscale properties focused on providing high levels of comfort and convenience. Of course, some migrant buyers may not be (or may no longer be) participants in the sports offered in these developments or resorts, but can instead be attracted simply by their investment or rental income possibilities. These non-traditional migrant buyers may actually prefer other sports, reside elsewhere in the mountains or simply use their resort property as seasonal or year-round income property.

Attitudes and behaviours of motorized RUs

Amenity migrants who enjoy motorized recreation also tend to be resource consumers, rather than conservers. Of the three RU groups, they are by far the most vocal and powerful advocates for unrestricted recreational access to public lands. Compared with traditional and non-traditional RUs, they tend to have less awareness of, or connection to, mountain environments, and so are less accepting of access restrictions such as temporary or permanent closures for wildlife or plant restoration. With a less integrative view of communities and environments, they also tend to be less accepting of restrictions such as building and zoning ordinances, height limitations, view shed preservation, noise abatement programmes and wildlife protection.

Amenity Migration and Mountain Recreation Users

As the number of people recreating in mountain areas sharply increased over the past 40 years, recreational facilities, real estate developers and manufacturers of recreation equipment, sports apparel and vehicles have all taken advantage of this lucrative and growing market opportunity. Improvements in the safety, comfort, ease-of-use, style and durability of recreation equipment and clothing have lured ever more people into the mountains for 'fun in the outdoors'. Marketers have leveraged to their advantage this shift in the concept of mountain recreation from 'rugged' to 'fun and cool' to create demand for products like skis, boats, climbing equipment, bicycles, kayaks, personal watercraft, shoes and clothing. Emblematic of this shift is the increase in the global popularity of sport utility vehicles and ORVs, which have been designed and carefully pitched to appeal to people's desires to feel 'rugged and adventurous' while surrounded by comfort. These changes to the societal cachet of mountain recreation have attracted more RUs to mountain areas and spurred the pace of amenity migration to them. An upward spiral now exists: improvements in equipment and access to mountain recreation continue to attract more mountain recreationists, driving more demand for equipment and access, thus creating more potential amenity migrants.

Mountain RUs and their tendencies to become amenity migrants

Up until the 1960s, the number of traditional mountain RUs, their tendency to become amenity migrants and their impact on the mountain environment were all relatively low. Road access to mountain areas was generally limited, seasonal and/or primitive, so a trip to the mountains usually required a significant investment of leisure time for people from large urban population centres. Also, while employment opportunities were relatively plentiful in urban areas, they were generally limited in mountain areas. Consequently, during this period, mountain RUs were mainly local mountain residents.

The decades from the 1960s onward saw a crucial turning point in mountain recreation,

mountain protection and amenity migration – the expansion of the concept of non-traditional mountain recreation linked directly to real estate development in mountain areas. During the 1960s, developers around the world realized they could attract people year-round to increasingly upscale and consequently higher environmental impact, planned real estate developments in mountain areas that offer a combination of popular winter sports, such as lift-served skiing and snowboarding, with warmer-weather sports such as golf, mountain biking and tennis. Non-traditional sports, especially lift-served skiing, were transformed from mere recreation into a marketing lure to attract homebuyers. In effect, skiing became an extremely effective 'come-hither amenity to sell real estate' (Clifford, 2002). This combination proved perfectly designed to attract amenity migrants. Mountain recreation changed from being something strictly for the 'rugged and adventurous' (as with traditional mountain recreation), to being something 'fun and cool' that most people could do easily on their own or with a group. The idea of owning a mountain home, a cabin in the woods, a condominium by the mountain lake or even a time-shared apartment became more enticing and available to the general public. The pace of AM to mountain areas accelerated dramatically as developers saw that a wider range of buyers could be attracted to planned mountain communities and resorts – those who would buy mountain properties because of their recreational amenities and those who would buy mountain properties for investment.

Similarly, motorized recreation offers attractive economic benefits to those communities away from ski resorts, large urban areas, national parks and other major attractions, but adjacent to large tracts of public land with unfettered motorized access. In such areas, prices for land and homes tend to be comparatively low (see Table 3.1). Because of this, motorized recreation opportunities are often successfully used as the 'come-hither amenity' to attract amenity migrants to these types of less-populated, less-regulated mountain areas.

All three general recreational user groups have contributed to some degree to the growing phenomenon of amenity migration in mountain areas, as previously noted. Yet, there are no tallies or clear statistics for the exact numbers or

Table 3.1. Comparison of median house values with recreational amenities proximity and abundance in the western USA.

State in western USA, town, county	Nearby recreational amenities	Median home value in each county in 2000 (in US dollars)
Arizona		
Flagstaff, Coconino County	Two hours from Grand Canyon National Park; surrounded by federal land with ORV areas	\$142,500
Tucson, Pima County	Near Saguaro National Park; 30 min from Mt Lemmon Ski Area; near federal land with extensive ORV areas	\$114,600
California		
Tahoe City, Placer County	On the shore of Lake Tahoe, one of the world's largest alpine lakes, offering fishing, swimming, and boating; adjacent to Forest Service land; near five major ski resorts	\$334,800
Winterhaven, Imperial County	Five miles from Imperial Sand Dunes Recreation Area, one of America's most popular ORV areas	\$42,500
Colorado		
Aspen, Pitkin County	Home of world-class four-season resorts; adjacent to Forest Service land	\$750,000
Grand Junction, Mesa County	Surrounded by federal land with extensive ORV areas; two major rivers and extensive hiking, rafting and climbing areas; 3 h from major ski resorts; near Colorado National Monument, 2 h from Arches National Park and Canyonlands in Utah	\$118,900
Nevada		
Reno, Washoe County	Twenty minutes from Mt Rose Ski area and 30 min Lake Tahoe, one of the world's largest alpine lakes, offering fishing, swimming and boating; adjacent to Forest Service land; near five major ski resorts; gaming casinos in town	\$161,600
Las Vegas, Clark County	Twenty minutes from Red Rocks Conservation Area and surrounded by federal lands with extensive ORV areas; less than 2 h from Death Valley National Park; world-class gaming casinos in town	\$139,500
Utah		
Park City, Summit County	Adjacent to Forest Service land and Olympic ski resorts, near Salt Lake City and the Great Salt Lake	\$450,900
Moab, Grand County	Gateway to Arches and Canyonlands National Parks and extensive ORV areas	\$104,700
Wendover, Tooele County	Gateway to Bonneville Salt Flats and extensive ORV areas	\$84,000

Median house values source: US Bureau of the Census, Decennial Census 2000.

cumulative impact of amenity migrants from each group. However, noting the history and characteristics of each of the groups, the manifested behavioural differences between them and how they relate in general to the mountain environment, one can gain some insight into the roles they play in mountain AM. Some broad generalizations can also be made about the tendencies of mountain RUs to become amenity migrants. For example, because of the long histories of their sports, traditional RUs have been migrating to mountain areas longer than other RUs. And because they often pursue their sports year-round, they naturally tend to find the lure of permanent migration to mountain areas more compelling than recreationists in other groups. In comparison, enthusiasts of the relatively newer groups of non-traditional or motorized recreation have shorter histories of migrating to mountain areas and often pursue their sports on more of an intermittent or seasonal basis. Therefore, they frequently are attracted as visitors or intermittent amenity migrants (Moss, 1994, 2004). The rates of amenity migration by all of the various groups of mountain RUs have, however, also been influenced by other important factors as well, such as the dramatic social, demographic and economic shifts that have occurred in the USA and other countries since the 1970s.

The influence of social shifts on rates of amenity migration by mountain RUs

In the second half of the 20th century, a dramatic change occurred in major cities of the developed world as heavy manufacturing activity shifted to lower-cost centres in the developing world. The resulting decline in jobs precipitated a 'hollowing out' of the physical and cultural infrastructure of many urban neighbourhoods, resulting in increased crime, poor-quality schools and a diminished quality of life in communities (Boyle *et al.*, 1999). Starting in the 1970s, an increasing number of people made the choice to live away from metro areas, either permanently or seasonally. Although the outflow of people from the metro areas ebbed somewhat in the economically turbulent 1980s, it continued strongly during the 1990s and into the 21st century as the economy strengthened

and consumer confidence rose (Johnson and Beale, 2004). These waves of ex-urban migrants were also powered by a new and growing social force – consciousness of the benefits of recreation and a clean environment to overall health and satisfaction with life, and an increasing willingness to alter one's life to achieve these benefits (Rudzitis, 1999).

This period also saw the growth of environmentalism and a huge surge in the popularity of traditional sports like backpacking, hiking and backcountry skiing. In addition, non-traditional sports such as kayaking and mountain biking were developed and became highly popular with a broad segment of the population. Not surprisingly then, many ex-urban migrants chose to settle in regions that offered the widest range of recreational amenities, particularly those areas with a high percentage of accessible public lands like the western USA. In the three decades from 1970 to 2000, population gains in recreation counties across the USA consistently exceeded those in both metro and non-metro counties, and in-migration fuelled most of this growth (Cromartie and Wardell, 1999; Johnson and Stewart, 2001; and Nelson, Chapter 4, this volume).

The influence of economic shifts on rates of amenity migration by mountain RUs

As local economies in mountain areas expand, amenity migrants appear to become more attracted from all RU groups. However, the rates of attraction have been 'supercharged' in some mountain areas by the rapid growth of real estate developments, planned communities and resorts that are often designed to particularly attract large numbers of non-traditional, higher disposable income mountain RUs, particularly skiers and golfers. Motivations are mixed, including the amenity migrant focused on appreciation of the natural environment, those who come to enjoy Nature while making an economic investment and others primarily attracted by the speculative opportunities such real estate can offer, especially in the early phases of development. Those primarily motivated by economic gain would be better identified as 'economic migrants' (Moss, 1994; Moss and Glorioso, 1999). It seems that seasonal and permanent

migration by these non-traditional recreationists is increasing commensurate with the availability of these types of developments. Also, additional in-migration from RU occurs from the 'second-tier' business expansion in mountain regions resulting from these developments, that is businesses serving businesses who serve the growing population. However, since the growth rates of both downhill skiing and golf appear to have stagnated, migrations spurred by those sports may be declining (Clifford, 2002; National Golf Foundation, 2004). Recognizing this, many mountain resorts, developments and communities now position themselves as 'multi-sport' or 'family' destinations in order to attract participants in the faster-growing sports such as mountain biking, kayaking, snowshoeing and snowboarding. While not the 'recreation' being discussed here, but significant to this diversification strategy, some places are also attempting to follow mountain amenity centres like Aspen, Banff and Santa Fe into the broad realm of cultural attractions (see Moss, 1994; Glorioso and Moss, Chapter 5; Lynch, Chapter 6, this volume).

This diversification of recreational attractions may be crucial to the future economic viability of many ski and winter sports resorts and communities. Scientists are already studying the possible negative effects of global warming on annual snow packs around the world. A combination of reduced snow packs and increased use of expensive or scarce water to create artificial snow could force many resorts to terminate their downhill skiing operations altogether. Some scientists and economists in the USA are predicting a total demise of downhill skiing in the Intermountain West by the mid or late 21st century. This could result in a sharp decline in property values and employment opportunities in these areas, even if warm-weather recreational amenities could be extensively developed (Wagner, 2003). Obviously, climatic and economic shifts like these could have major impacts on future magnitudes, rates, locations and patterns of amenity migration to mountain areas.

The influence of demographic shifts on amenity migration by mountain RUs

Another major force driving recreationists to become mountain amenity migrants is the growing

population (both in numbers and in percentage of total population) of retired people in the USA and the rest of the economically developed world. As the world's post-Second World War 'Baby Boomers' enter retirement age, this demographic segment is predicted to grow significantly. The US Bureau of the Census estimates that by 2020, about 35% of the population – 108 million people – will be 50 years of age or older (Campbell, 1996). Projections indicate that mountain regions will gain the largest share of that part of the population (Campbell, 1996). Already, the states with the most rapidly growing percentages of elderly (65 + years old) residents are, in rank order, Alaska, Utah, Idaho, Colorado, Nevada, Wyoming and Washington, and this population sector is expected to double by 2025 (Campbell, 1996). In contrast to previous generations, when today's urban and suburban workers retire, they are generally more active and in better health than their predecessors. So, they are more likely to consider migrating to areas that offer recreational amenities, such as mountain regions. And they are demonstrating increasing willingness and ability to relocate away from their extended families, to areas with a lower cost of living and a perceived higher quality of life, such as mountain regions. This has been facilitated by the growth of post-retirement income from pensions and other retirement and savings plans. In the USA, 'non-labour income' from retirees now represents over a third of the personal income of the Intermountain West (Wagner, 2003).

How do these social, economic and demographic changes impact more specifically the role that recreation users play in mountain amenity migration? Among amenity migrants who are retirees, the most popular recreational activities are naturally those that are less physically demanding, such as motor boating, camping, fishing, walking, bird watching and other types of wildlife and nature viewing, etc. As people age, their recreational choices may change because of declining levels of health, mobility or aerobic fitness. Increasing numbers of traditional and non-traditional recreationists are now shifting their interests to motorized sports as a way to retain a sense of exploration or enjoyment of the mountains. The rate of motorized RUs who are mountain amenity migrants is expected to continue to increase as our overall population ages (Denner, 2004). In the USA, the number of

people using off-road vehicles has soared from five million in 1972 to 36 million in 2000 (US Forest Service, 2004). Further evidence can be found in the impressive growth in sales of recreation vehicles (RVs) since the early 1990s. The US\$12 billion RV industry reports shipments to dealers increased from 163,300 units in 1991 to 320,800 units in 2003 (Recreation Vehicle Industry Association, 2004). This represents another manifestation of the growing societal shift away from the more traditional, rugged ways to enjoy mountain areas to more comfortable and luxurious motorized ways.

How do perspectives and concerns about amenity migration differ among the groups?

Perspectives and concerns of traditional RUs

In general, traditional recreational users regard the growth of amenity migration as more of a threat than a benefit to their ability to enjoy the mountains. They have a tendency to resent getting 'crowded out' by a growing tide of arrivals from other groups. In reaction, they are likely to lobby against new real estate developments or resorts that alter the character of an area or attract significant numbers of additional migrants or tourists. With a broader perspective of mountain environments than other RUs, traditionalists are also more likely to recognize and voice concerns about other impacts related to amenity migration: natural resource degradation and the increased likelihood of fire, floods, avalanches, rockfall and mudslides; increased vehicular traffic on highways and in towns; crowding; and pollution of all kinds – air, water, soil, noise, light and visual pollution such as billboards. Traditional RUs are also likely to lobby against any perceived changes to or impacts upon backcountry areas that increased AM can produce, such as loss of the general ability to distance oneself from 'civilization', or loss of solitude, pristine view sheds or dark skies at night. Of particular concern to them is lost or reduced public access to wilderness or wild lands through the imposition of regulations such as trailhead quotas or seasonal closures. Armed with high levels of outdoor skills, traditional RUs are comfortable and competent enough to disperse further and more widely into

the off-road backcountry than most other RUs. Knowing that the predominant amount of backcountry use and impacts generally are concentrated within one mile from any trailhead, they have historically challenged land managers to formulate use quotas that do not discriminate against wide-dispersion, low-impact users.

An important distinction exists though if quotas or seasonal trail closures are imposed for the protection of endangered wildlife or vegetation. If the science justifying such actions is presented in credible ways to traditional RUs, they have demonstrated very high voluntary compliance with closures or restrictions of their activities for this type of resource protection and preservation. For example, rock climbers in the USA have pro-actively developed ways to help the National Park Service and other land managers, develop highly successful voluntary compliance with temporary closures of cliffs and approach trails to protect and restore endangered native animal and plant species (Pyke, 2001). Species that have enjoyed protection from climbers include peregrine falcons, prairie falcons, golden eagles, desert bighorn sheep, Mojave Desert tortoise and desert lizards such as the chuckwalla and the Gila monster. In California, there is even voluntary protection of the ancient middens of wood rats, which provide scientists with a priceless fossilized seed history of the region.

Perspectives and concerns of non-traditional and motorized RUs

In contrast to traditional RUs, both non-traditional and motorized RUs tend to view amenity migration more as a benefit to their ability to enjoy the mountain resource rather than a threat to it. Lacking the historic environmental activist roots of the traditional RUs, and often having limited outdoor skills or background, they also tend to have less psychic and physical 'connection' to the natural environment, with more tolerance and desire for human infrastructure or built environment in the mountains. Therefore, they tend to welcome and actively promote economic development of mountain areas, appreciating the increased number of shops, services, road access and jobs it creates. If real estate investment is also a reason for their migration, then increased population and economic development may be viewed



Fig. 3.2. Hiking at the top of Mt Whitney, California, a few hours from large urban centres, which is now regulated by a lottery system for most of the year (photograph: L. McMillan, July 1995).

by these RUs as positive ways to boost the market values of their properties.

Engaging recreational users to minimize impacts of amenity migration in mountain areas

This chapter has focused on giving readers a broader understanding of mountain RUs and their varied roles in amenity migration. The goal is to enable you, in dealing with the impacts of amenity migration by mountain RUs, to better understand the impacts they may create in mountain areas and the impacts they can help you prevent. Knowing how each recreation group reacts to public opinion regarding its impacts on mountain environments is one way that communities and land managers can engage RU groups to help address the impacts of their sports. Below are other examples of how land managers, communities and leaders of the outdoor recreation industry have successfully engaged RU groups in helping them preserve and protect mountain areas from the negative impacts of AM.

Engaging the outdoor recreation industry and leveraging RUs' economic and political powers

Far from being an activity enjoyed mainly by impecunious young people, outdoor recreation

today ranks high in popularity with economically and politically powerful adult populations around the world. In 2002, 69% of all Americans, 16 years and older, participated at least once in one of the 21 human-powered activities tracked by the trade association of the outdoor industry (Outdoor Industry Association, 2002). Of this overall group of outdoor recreationists, a significant part (31%) were 45 years or older. In comparison, only 27% were 16–24 years old, 22% were 25–34 years old, and 20% were 35–44 years old. The median age in these activities studied in 2002 was 36 years, with only rock climbing showing an under-30 average participant age, at 26 years. Snowshoeing, kayaking, cross-country skiing, cycling and hiking all showed an average participant age of 36 years or older. In 2001, walking was shown to be the most common outdoor recreation activity, with Americans over the age of 15 years walking outdoors about 18 billion times that year. The outdoor recreation industry in the USA and the world at large is enormous. Outdoor retailing industry figures currently show that over US\$18 billion is spent in the USA each year on human-powered outdoor activities and gear (Outdoor Industry Association, 2002). When the additional billions of dollars spent each year on motorized recreation are added in, the comprehensive economic size of the outdoor recreation industry in the USA in 1998 was estimated at US\$400 billion. Politicians and land managers

are increasingly aware of the growing economic size and power of this industry. The economic value of preserving natural resources for recreational amenities now far outweighs gains from their extraction. In the USA, the estimated contribution in 1998 of the National Forest System to the gross domestic product was US\$130 billion, over 80% of which was contributed by natural resource amenity values that support recreation opportunities (Dombeck, 1998b). As revenues from the extraction of natural resources continue to be dwarfed by those from recreational amenities, the outdoor recreation industry and RUs are able to exert greater influence in land use policies and issues as *The latest 1000 pound gorilla* (Margolis, 1998).

Additionally, the world's increasing appreciation of, and appetite for, outdoor recreation is also driving a significant shift in how people relate to the environment. Realizing that far more economic gain can be had from promoting the recreational use of natural resources than the extraction of them, key decision-makers at all levels of government are now promoting the larger and longer-term value of conserving such resources for recreation and public health. Developing regional outdoor recreation opportunities is also now recognized as an effective way to revive the shattered economies of mountain areas that may be struggling with the decline or demise of their extractive industries (Johnson and Beale, 1998). Today the outdoor recreation industry worldwide has reached critical mass for empowering recreational users to make a very positive difference in mountain protection (Kenworthy, 2003). It is a potentially powerful political and economic force that can influence environmental policies in mountain areas (McHugh, 2003). Here are some examples of how RU groups have been successfully engaged to minimize negative impacts of amenity migration in mountain areas.

Engaging traditional RUs in protecting mountain areas

An important example of the natural impulse toward resource stewardship by non-motorized

recreationists occurred in 2003, when the 'political muscle' of traditional RUs and the human-powered outdoor recreation industry was flexed for the first time in the USA (McHugh, 2003). Officials from the global Outdoor Industry Association (OIA) met with Utah Governor Mike Leavitt to voice their concerns about new agreements with the US Department of the Interior that would in effect prevent public land managers from inventorying areas for potential designation as wilderness or Wilderness Study. OIA officials stated that such agreements could destroy the wilderness-quality recreation opportunities on approximately 2.4 million ha of pristine federal lands areas in Utah and other western states by opening them to road building for oil and gas exploration and ORV use. In addition, OIA officials voiced their concern that once development or road building (whether authorized or unauthorized) occurs on these types of federal lands, they may become ineligible for permanent wilderness protection by the US Congress. Speaking as the industry trade group that represents 1100 outdoor equipment and clothing manufacturers worldwide, the OIA officials also reminded the Governor that they were considering moving their biannual trade shows (which generate over US\$24 million annually in business revenue) out of Utah, to another state with stronger wilderness protection policies (Kenworthy, 2003). In response, the Governor pledged to strengthen his advocacy for protecting Utah's mountain wilderness from development and ORVs, and created a task force to reconsider the six million acres affected by the contentious decision and identify lands that deserve to retain their wilderness protection (Erickson, 2003). In 2003, the OIA also lobbied Colorado Governor Bill Owens to abandon a controversial action that would have allowed the creation of new roads across federal parks, wildlife refuges and areas that are currently protected as if they were wilderness (Kenworthy, 2003).

As this example demonstrates, non-motorized RUs and their affiliated organizations are now beginning to forge a collective voice in favour of mountain protection. They are showing increased willingness and ability to remain engaged in the political process to help shape

policies affecting mountain regions. Clearly, they can serve as an important ally for land managers, community leaders and other groups favouring mountain protection. They can also be used as a role model for other RU groups who need to address their impacts of AM in mountain environments.

Engaging motorized RUs to protect mountain areas

On the opposite side of this issue are motorized recreation enthusiasts, who since the 1960s have lobbied extremely effectively for increased unrestricted access to public lands. Backed by the economic clout of the powerful automobile, oil and gas industries and a plethora of ORV associations, they have won the solid support of many federal, state and local government officials in mountain areas. Because of this, they have successfully overturned or blocked efforts in some areas to restrict or concentrate off-road vehicle usage in order to protect mountain and river environments. As previously mentioned, the economic size of this group easily dwarfs that of other RUs. In California alone, the economic contribution of ORV users is estimated to be over US\$9 billion annually (Denner, 2004). In the USA and Canada, snowmobilers spend an estimated total of more than US\$10 billion on their equipment, clothing, accessories and vacations each year (International Snowmobile Manufacturers Association, 2004).

However, disturbing public revelations of the environmental degradation that is being caused in mountain areas by motorized sports is mounting. Communities, environmental groups and non-motorized recreationists are applying more pressure on land managers to restrict ORV use and hold motorized recreationists accountable for the damage they cause, including accelerated damage to sensitive wildlife habitats, threatened and endangered species, archaeological sites and areas proposed for wilderness designation. In 2004, the Forest Service sued a motorized recreationist for almost US\$10 million to recover their costs of fighting a 16,000 acre wildfire in central Washington State started by him while operating his off-road vehi-

cle without a required exhaust spark arrester. In response to public outcry, motorized sports enthusiasts, associations and equipment manufacturers are now looking for ways to allow people to continue enjoying motorized recreation in mountain areas while minimizing their environmental impact. For example, highly contentious and well-publicized conflicts between motorized and non-motorized RUs in Yellowstone National Park over snowmobile access and impacts are now motivating manufacturers to offer some models of snowmachines that produce less noise and air pollution. These manufacturers and motorized recreation associations are keenly aware that public acceptance of motorized sports, and tolerance of their negative impacts, is crucial to assuring their continued popularity and access to public lands. Therefore, some motorized recreation associations and non-profit groups such as Tread Lightly! have now established 'responsible riding programmes' that provide suggested guidelines and training to educate ORV riders in ways to recreate while protecting human health, wildlife habitats and natural environments. In addition, some motorized RU groups have begun to actively engage with land agencies, parks, communities and non-profit groups to help remediate their impacts in mountain areas.

For example, in the scenic eastern Sierra Nevada of California, the Bishop Field Office of the Bureau of Land Management (BLM) has achieved admirable results in building collaborative relationships with recreational amenity migrant groups in the region, particularly with ORV groups. The innovative 'stakeholder engagement' process they use promotes mutual recognition by all the various RUs – traditional, non-traditional and motorized – that maintaining a healthy mountain environment is beneficial to the enjoyment and sustainability of each of their preferred recreation activities. It appears that once RUs become aware of the integral part that natural resources play in 'their' experience, they are more willing to work together to protect these shared resources. A crucial link among RUs can be forged by helping them realize that they are all actually seeking the same kinds of experiences in the mountain environment – a sense of freedom, natural simplicity and remoteness – no matter

what activity they prefer to pursue. Results in the Bishop area have shown that once recreational user groups understand this commonality, generally all can agree to do their part to protect the mountain environment.

The Bishop BLM and the local communities continually sponsor projects to allow volunteers from the various RU groups to monitor and mitigate resource impacts in the mountains. For example, groups of ORV enthusiasts/volunteers directed by BLM rangers spend a day each month monitoring and restoring damaged vegetation and carefully erasing ruts, tracks and other impacts from ORVs. By having the chance to learn about their impacts through these projects and ‘give back’ to the places they enjoy, RUs gain a stronger sense of stewardship toward mountain resources, plus a deeper connection to the communities in the region. They also gain a new sense of community identity, as their perspective shifts from being disinterested ‘outsiders’ to engaged and activated ‘insiders’, with a greater stake in the future of the mountain region. They become more willing to remediate negative impacts of their recreational use, and recognize impacts that can be prevented in the future (J. Jennings, Bishop BLM Office, California, 2004, personal communication).

Engaging non-traditional RUs in protecting mountain areas

Both the popularity and environmental impacts of non-traditional recreation have grown tremendously in the last 40 years, and as with ‘motorized sports’, non-traditional sports have also come under increasing pressure from environmental groups to address and mitigate their negative impacts. Many non-traditional sports associations have now published guidelines for recreating responsibly in the outdoors, and some even offer instruction in these ‘recreational ethics’, which include a code of responsible behaviour, outdoor skills and resource protection awareness and personal safety and rescue tips. Relying heavily on favourable public opinion to retain continued access and use of public lands, non-traditional sports and their trade associations have also begun to engage more proactively with land agencies, parks, communities and non-profit groups to

address their negative environmental impacts. For example, in May 2000 the National Ski Areas Association (NSAA), a trade association of ski-area owners representing over 330 resorts, adopted an environmental charter called ‘Sustainable Slopes’. Reacting to rising concerns about lift-served ski resorts’ significant water and energy use, degradation of mountain ecosystems, emission of greenhouse gases and waste management issues, this 24-page charter was published to teach resort owners ways to reduce environmental impacts from their resort operations. Such guidelines are voluntary, and it remains to be seen whether they are actually accepted and implemented by resort operators across the industry.

Public opinion is now focusing more intently on the causes of global warming and pollution, and ski areas and multi-season resorts are receiving increased scrutiny of their environmental impacts. Some recognize that if they are perceived by the public as somewhat ‘eco-friendly’, they might be able to successfully market their year-round resorts as ‘eco-tourism destinations’, enabling them to tap into one of the fastest-growing trends in both recreation and tourism. Given the choice, consumers/tourists are beginning to demonstrate a preference for eco-friendly alternatives. Therefore, there are now more economic incentives for those resorts that offer non-traditional sports to turn words into actions and actually ‘do the right thing’ for mountain environments, as this has been shown to boost bottom line profits and compensate for the expense of minimizing environmental impacts. Although questions remain as to how consistently or thoroughly resorts will carry out their stated environmental stewardship goals over the longer term, it is clear that non-traditional RU groups are becoming increasingly sensitive to public awareness of the negative environmental impacts caused by their migration to mountain areas.

Why is it important to leverage the power of RUs to preserve mountain environments?

Today, the urban/wilderness interface continues to grow around the world as cities sprawl into

metro regions and flow up into the mountains. Seven of the ten fastest-growing cities in the USA border on or are near National Forests, National Parks or wild lands. The USA's fastest-growing states are those comprised of more than 60% accessible public lands (US Bureau of the Census, 2002). Whereas suburbs used to be able to provide necessary relief from urban pressures, now suburbs and even resort developments such as Aspen, Colorado and Whistler, British Columbia have problems and environments similar to those of urban areas, such as traffic, congestion, lack of open space, etc. An 'urban imperative' now exists – recognition of the need to physically and psychologically link the larger and more powerful urban and metro region populations with mountains, so they will be more willing to vote for and fund programmes for their protection. More people are choosing to live as amenity migrants, and the special sanctity and resources of mountains are becoming more imperilled by the resulting pressures and problems of urbanization. As mountain resources continue to degrade and vanish, community planners and resource managers now see the need to instil in all mountain users a greater sense of commitment to protecting them for the long term. People are attracted to the mountains at an increasing rate, and the job of mountain protection has grown far too large for the relatively small number of officials charged with that task.

The salient question today then is: What can we touch and activate within people that will compel them to protect mountain environments from the negative impacts of amenity migration?

By understanding the motivations, perspectives, history and interests of the growing ranks of recreational users, community planners and resource managers can find answers to that critical question. They can tap into the natural instincts of mountain RUs to 'do the right things' to preserve and protect the places they grow to love by recreating in them. They can then use recreationists as powerful allies for mountain protection efforts and models of how groups can work together to address the impacts of amenity migration in mountain regions. Reaching out to mountain RUs effectively, and reminding them of the historic roles they have played in environ-

mental protection, planners and managers may ensure that they become a key part of solutions to amenity migration and other mountain protection issues.

The rising tide of amenity migration will continue as long as people regard mountains as favoured places to live and work, offering a higher quality of life than lowland and metro areas. If this trend continues as predicted, mountain environments can be imperilled where negative impacts from amenity migration are not fully recognized and mitigated. To break this chain of events and prevent the destruction of what more and more people are seeking, three parallel, concerted actions need to be taken by governments, communities, land managers, educators, public agencies, corporations, the private sector and individuals:

1. Educate people about the many reasons why mountains are valuable to them, physically, economically and spiritually. The importance of this step cannot be overstated. As the noted Senegalese conservationist Baba Dioum observed, 'in the end, we will only conserve what we love, we will love only what we understand, and we will only understand what we are taught' (Renick, 2004: 3).
2. Provide a wide variety of appropriate stewardship opportunities that enable people to connect powerfully with mountain environments and act decisively to protect them.
3. Reduce amenity migration pressures on mountains by taking steps to significantly improve the quality of life and natural environments within the world's metropolitan areas.

In doing so, all stakeholders – long-time residents, amenity migrants, land managers, communities, business owners, recreationists, politicians, tourists and even those who may never visit mountains yet support the need for their protection – can focus on preserving and protecting mountain resources that offer benefits and enjoyment to them all. When the collective focus in mountain areas can be shifted from personalized short-term gains from consumption or destruction of natural resources, to universal long-term gains from their preservation, amazing economic and environmental transformations can occur.

As has been shown in this chapter, recreational users can be a powerful strategic force in these transformations. They can help others recognize the unique ways that mountains help to protect them – and all of us – through the recre-

ation, economic stability, water, resources, beauty and solace they provide. Recognizing this, they will then be motivated to put their self-interests aside and act to preserve mountain environments, now and in the future.

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Part II

Amenity Migrants in the Americas

This region of the world has led in the development of amenity migration, and probably has the largest numbers of these migrants. This condition and the comparatively greater information available about especially the North American amenity migrant is reflected in the number of cases from the region in this volume.

In Chapter 4, Peter Nelson explores the relationship between amenities and migration at different geographic scales in the USA, with an emphasis on the Rocky Mountain Region. Drawing on the US Department of Agriculture's Natural Amenity Index and a survey of recent migrants to four rapidly growing Rocky Mountain communities, his analysis highlights: (i) the changing importance over time of amenities in explaining population change for non-metropolitan counties; (ii) differences within regions for amenities role in explaining migration patterns, with a focus on New England and the Rocky Mountains; and (iii) the importance of more qualitative dimensions of amenities embedded in both natural and social landscapes on the local level within the Rocky Mountain Region.

In Chapter 5, Romella Glorioso and Laurence Moss review and assess some 20 years of amenity migration in the Santa Fe area of New Mexico, USA, focusing on the failure of its policy makers, public planners and influential citizens to both acknowledge this critical change agent and plan for it. This has resulted in significant growth pressures, particularly environmental degradation, water shortage, lack of affordable housing and dislocation of the poorer inhabitants, while both Santa Fe City and, more so, County are dominated by *laissez faire* political economics. Although the authors are not optimistic about Santa Fe sustaining its environmental and cultural attributes, they conclude with recommendations for doing so. This case perhaps offers the most longitudinal information available about amenity migration.

Moving north to Jackson Hole, Wyoming, in Chapter 6 Margie Lynch gives us a comprehensive picture of the impacts of the amenity migrants on this amenities-rich mountain bioregion. It is an excellent example of the challenges being faced by a place attracting large numbers of amenity migrants and its attempt to retain its fundamental environmental and community assets. In this context, the author pays particular attention to the transportation issues associated with amenities-led growth and change.

Following the Rockies further north, in Chapter 7 Steve Thompson discusses how the rapid in-migration of amenity seekers to Flathead County, Montana has brought about economic growth and other change. The past decade has marked a new trend in which jobs follow people, not the opposite. However, the very attributes that the in-comers value most are threatened, as they have tended to bolster the *laissez faire*, anti-regulatory and often isolationist forces that have come to dominate public policy in the US rural, interior west. Yet from recent events, Thompson suggests that amenity migrants may rally to help conserve the natural amenities that drew them, through building strategic alliances across diverse community sectors based on a shared appreciation of place.

Crossing the 49th parallel into Canada, Chapter 8 describes and analyses the rapid and considerable rush for Alberta's mountain amenities. Its impacts on this large region are yet at an early stage, but seem to be exhibiting similar characteristics to amenity migration in the Rocky Mountains further to the south. The authors, Bart Robinson and Carole Stark, after identifying the province's amenity migration characteristics, outline their comparative details for three amenity-growth hotspots: Canmore, Cochrane and the Municipal District of Foothills.

In Chapter 9 Sean Moore, Peter Williams and Alison Gill describe the development of Whistler in the Coast Mountains of British Columbia as it transitioned from a collection of guest services primarily for snow skiers to a complex four-season resort town, and is now becoming a lifestyle community for a growing number of amenity migrants. They focus on the past decade and a half and the amenity migrants' most challenging impact – escalating real estate prices and subsequent intensifying of the scarcity of affordable housing for Whistler's labour force. The town's innovative approaches to retaining a stable resident workforce within its boundaries are discussed and future strategies are recommended.

Moving to the south central interior of British Columbia, in Chapter 10 Janice Billy gives the reader rare and disturbing insight into the struggle for cultural survival by an indigenous people, the Secwepemc, threatened by the promotion and accommodation of contemporary seekers after environmental amenities. Billy reports on the impacts, their origin and the Secwepemc's response. Of particular significance is her explanation of the process by which environmental degradation is destroying a symbiotic living culture. She concludes with an eloquent request for a new era of reconciliation in which the Secwepemc and non-Secwepemc can live in peaceful co-existence.

In Chapter 11, Raymond Chipeniuk describes a case of collaboration between academic planning researchers and communities of the Bulkley Valley in north-western British Columbia. While rich in natural beauty, a First Nation history and culture and a highly developed rural community life, the valley is threatened by falling natural resources extraction employment. His research indicates residents believe careful planning can bring in amenity migrants to contribute importantly to economic and social sustainability while ensuring their negative impacts are minimized.

Chapter 12 is a historical analysis of a long-existing recreation region in north-eastern USA, the Adirondack Park. This rare study of eastern North American amenity migration challenges, by Wayne Glass, describes the phenomenon in close proximity to large urban agglomeration, which heightens the propensity to second-home ownership. The author gives particular attention to the unique regulatory context of this huge park and its effect on amenity migration.

Paulina Chaverri, in Chapter 13, describes and assesses the cultural and environmental impacts of foreign amenity migrants in a peripheral mountainous protected zone in the context of the rapidly expanding Metropolitan Area of San José, the capital of Costa Rica. Land use, local culture and economics are under severe pressure to change. The author focuses on these dynamics in the hillside community of San Antonio de Escazú, and her micro-scale field research also records the perceptions of key stakeholders.

The research team of Adriana Otero, Lía Nakamura, Susana Marioni, Elisa Gallego, Alicia Lonac, Rodrigo González, Andrés Dimitriu and Claudia Hosid in Chapter 14 identifies the characteristics and consequences of amenity migration in San Martín de los Andes, Argentina. They also assess the importance and historical continuities of its development in this early settled, long-standing mountain tourist destination in Patagonia.

4 Geographic Perspective on Amenity Migration across the USA: National-, Regional- and Local-scale Analysis

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Introduction

Migration is an incredibly fascinating and complex phenomenon impacting every individual and every region of the earth. Even people who do not migrate have effectively made a migration decision – one *not* to move. People move for a variety of reasons, yet what prompts one individual to move might cause another person to stay. Furthermore, as natural increase moves closer to replacement levels in the USA and much of Northern and Western Europe, domestic migration and immigration from abroad serve as primary mechanisms driving regional population change. As a result of this complexity and importance, migration has been the object of a significant amount of scholarly inquiry. Until recently, however, economic perspectives have dominated the frameworks for migration studies. This chapter (and this volume) contributes to a growing body of literature that expands the scope of migration studies into non-economic terrain by focusing on the relationship between environmental and socio-cultural amenities and migration in the USA at increasingly fine spatial scales, ranging from national-level trends down to the level of the individual migrants themselves.

Three fundamental questions guide the analysis of migration and amenities presented here. First, how has the relationship between migration and amenities changed over the last 20 years? Second, how does the amenity–migration relationship vary across geographic regions?

A significant amount of academic literature has examined this phenomenon in the western USA, but no work to date has explored the relationship in other regions of the USA. And third, in what ways do the migrants themselves emphasize the role of amenities in their migration decision making? The text that follows is divided into three sections. The literature review places the growing importance of amenity migration in historical context and highlights some of the key contributions from the geographic literature focusing on migration and amenities in the Rocky Mountain West. The empirical section examines the amenity–migration relationship through both time and space and at varying scales of analysis. It argues for a more inclusive notion of amenities, extending beyond the confines of the natural landscape. The discussion section raises questions about measuring amenities, discusses methodological issues for amenity migration scholars and outlines a research agenda for future amenity migration research.

The Role of Amenities in Migration – a Brief Review

In 1885, Ernst Georg Ravenstein published his ‘Laws of Migration’ with the British Royal Statistical Society. From this auspicious beginning, a voluminous migration literature has emerged across the social sciences. Migration has been

studied from a wide variety of disciplinary perspectives and at an array of geographic and analytical scales. At the level of the individual, we now understand, for example, that migration propensities vary with age, race and gender (Speare *et al.*, 1975; Bailey, 1993). At the macro scale, we also recognize that while a variety of economic factors influence aggregate migration flows, job growth appears to be more important than wage differentials between sending and receiving regions (Greenwood, 1981, 1985). While Ravenstein's laws mentioned many different factors influencing migration flows and behaviour, two in particular serve as a point of departure for this particular analysis of the relationship between migration and amenities in the USA. First, Ravenstein postulated that economic factors dominated migration motivations, and second, Ravenstein argued that the most mobile populations were those in their early to mid twenties (Ravenstein, 1885).

That these two laws remain valid today – nearly 120 years after Ravenstein first proposed them – is indisputable. However, two fundamental transformations in today's society – one economic and one demographic – serve to alter the emphasis placed on these two particular factors influencing migration. The nature of work in contemporary developed economies has been dramatically restructured over the past 50 years. This economic restructuring results in significant job loss in certain sectors (typically manufacturing and resource extraction) and tremendous job growth in other sectors, namely the services (i.e. retail trade, real estate, finance, personal services, producer services, etc.). Between 1970 and 2000, manufacturing employment in the USA declined by roughly 3%, and similar processes of economic restructuring are evident in Europe as well (see Perlik, Chapter 15, this volume). At the same time, employment in the services grew by an estimated 212% (Bureau of Economic Analysis, 2003). This shift in employment concentration towards the service sectors has significant implications on migration behaviour at both micro and macro scales. As more employment becomes concentrated in service versus goods-producing sectors, employment location becomes more flexible. It is less important in a service economy to locate in close proximity to natural resources or material inputs. Rather, as the information component (i.e.

services) of economy expands, firms become more sensitive to factors important in attracting labour. Such factors often include natural as well as socio-cultural amenities, and a rich literature exists in economic geography about the importance of such factors in the development of service agglomerations in particular locales (Scott and Storper, 1986; Storper and Christopherson, 1987; Markusen *et al.*, 1991; Peck, 1992). With the expansion in services comes other multiplier effects stimulating growth in auxiliary segments of the economy, such as construction and the public sector. Therefore, with the rise of services in today's post-industrial economy, there exists potential for amenities to play an increasingly important role in driving interregional population migration. Furthermore, this restructuring in the nature of work provides some individuals with both increased discretionary time and disposable income, enabling amenity migration for these relatively advantaged populations (Price *et al.*, 1997). While Ravenstein's claim that economic motivations dominate migration decision making undoubtedly remains valid, the factors influencing the nature and location of economic activity have changed, which serves to alter regional migration patterns. Indeed, much of the well-documented growth of the 'Sunbelt' has been attributed to the intersection of these factors (Bluestone and Harrison, 1982; Plane, 1992, 1993).

In addition to the changes characteristic of a post-industrial economy, the demographics of advanced economies are shifting as the population increases in age. For example, Italy, Scandinavia and the USA all have more convex population pyramids indicative of an ageing population. As the population ages, migration decision making also changes (McHugh *et al.*, 1995; McHugh and Mings, 1996). The post-war baby boomers are now entering their mid- to late 50s, and life-course perspectives on migration highlight the ways in which migration behaviour changes with age. Younger individuals are more sensitive to housing costs and employment opportunities, while individuals at older ages become more sensitive to proximity to relatives, environmental qualities, access to health care or safety as they make their migration choices. Indeed, the propensity to make a move to non-metropolitan destinations (often believed to offer higher quality of life and greater access to natural amenities)

increases with age, and recent work has shown how natural amenities play an increasingly important role in explaining aggregate-level migration flows for older populations (Wilson, 1988; Nelson and Sewall, 2003).

These shifts in the demographic and economic context for migration have not gone unnoticed by geographers interested in population dynamics and the ways in which natural amenities shape migration systems. In the early 1950s, researchers began to acknowledge the role amenities might play in driving regional growth. 'For the first time in the world's history pleasant living conditions – amenities – instead of more narrowly defined economic advantages are becoming the sparks that generate significant population increase, particularly in the United States' (Ullman, 1954: 119). Ullman went on to describe how mild climates, presence of mountains and access to recreational activities (hunting, hiking and fishing) were all becoming increasingly important in driving regional population change. While Ullman's work was situated within the historic expansion of California, Arizona and the Pacific Northwest during the early part of the 20th Century, more recently, scholars have revisited Ullman's 'amenity factors' as non-metropolitan regions have gone through at least two significant periods of relative population expansion. More recent demographic trends indicate that non-metropolitan regions are poised to benefit the most from amenity-driven migration.

During both the 'Rural Renaissance' of the 1970s and the 'Rural Rebound' of the 1990s, non-metropolitan portions of the USA grew at relatively rapid rates (Fuguitt, 1985; Johnson and Beale, 1994; Fuguitt and Beale, 1996; Johnson and Fuguitt, 2000). After decades of population loss, non-metropolitan counties grew 14.2% in the 1970s, and while growth subsided in the 1980s (1.2%), more widespread growth (9.2%) returned in the 1990s (McGranahan, 1999). A variety of explanations have been offered to explain these periods of increased non-metropolitan population growth, ranging from economic restructuring to metropolitan spill over, yet a common refrain echoing throughout this literature is the important role of natural amenities and their ties to positive net migration. (See Stewart, 2002 for a comprehensive review of the forces contributing to non-metropolitan population fluctuations.)

Nowhere has this amenity-focused migration drawn more attention than in the western USA. The 1990s were a period of tremendous transformation in the non-metropolitan western USA. Six of the top ten fastest-growing counties in the USA during the 1990s were Rocky Mountain Counties, and four of these six were non-metropolitan (Park, Elbert, Archuleta in Colorado and Summit County, Utah) (US Census Bureau, 2001a). At the core of this rapid population change is a restructured regional economy. In the past, this region's economic base centred on extractive industries, such as farming, mining and timber. Today, while these industries are still present and important, their relative size has declined. In 1969, slightly more than 10% of jobs in the Mountain West were in extractive sectors, but today less than 4% of employment falls in these sectors. Similarly, non-employment income and earnings from services now account for more than half of the region's total personal income (Power and Barrett, 2001). Replacing the extractive industries is an economic base built on tourism, quality of life and the unique sense of place indigenous to the rural West.

Uniqueness in the West comes from a clean environment, lots of public open space, wilderness, and friendly neighbours.... The rural wilderness can create a more developed sense of place because of the closeness and interplay with nature

(Rudzitis, 1996: 134–135).

As Rudzitis claims, the environmental qualities of the rural West play a pivotal role in developing a unique sense of place and serve as a primary motivation for migrants choosing to move into the region. 'Scenery', 'outdoor recreation' and 'environmental quality' were the three most frequently cited reasons recent migrants gave for their moves to rural communities in the West (Rudzitis and Johansen, 1989). Furthermore, places experiencing the most rapid growth within the western USA were those places with little dependence on extractive economic activity and a greater commitment to environmental preservation (Rudzitis, 1993).

While Rudzitis' work is based on surveys of migrants to a select number of counties in the West, other macro-scale analyses suggest

the phenomenon to be rather widespread across the region. Between the 1980s and 1990s, counties enjoying the biggest turnarounds from net population loss through out-migration to population gain through in-migration were high-amenity retirement and recreation-dependent areas (Shumway and Davis, 1996). This combination of amenity-based migration and a new economic base has created what some call a 'New West' (Riebsame, 1997; Nelson and Beyers, 1998; Nelson, 2001), and counties broadly defined as 'New West' counties enjoyed the highest levels of in-migration (Nelson and Beyers, 1998; Shumway and Otterstrom, 2001).

It is clear that changes in the nature of today's economy and demographic shifts in the population of the USA combine to make natural amenities an increasingly important factor influencing migration at both individual and regional scales. This phenomenon has received considerable academic attention in the Rocky Mountain West, as the exploding growth rates of the 1990s marked such a dramatic break from past trends of population loss through out-migration. While it is unlikely that environmental amenities have changed measurably over the course of a decade, it is plausible to suggest that migration streams are becoming more influenced over time by amenity factors. Furthermore, it is unclear what role amenities might play in driving migration flows in other geographic regions beyond the high-amenity western USA. Do amenities play a similar role regardless of region or are there specific geographic contexts in which amenities appear to exert a greater impact on migration streams? Through macro-scale quantitative techniques, the analysis that follows provides answers to these questions by disaggregating the 'amenity-migration' connection for different geographic regions and for different time periods. Through a combination of quantitative and qualitative methods, the analysis further illustrates how the concept of amenity may be geographically contingent, as the sense of place emphasized by Rudzitis (1996) embodies distinctly different combinations of natural and socio-cultural characteristics in different geographical contexts. For example, an amenity in New England may be quite distinct from an amenity in the Rocky Mountain West.

Data and Methods

Quantifying natural amenities

The task of quantifying natural amenities will necessarily involve some compromise because the notion of amenity is admittedly subjective. What is desirable to one person may be loathsome to another. For example, I enjoy crisp January mornings in Vermont when the temperatures fall below zero, and my grandfather thought there was nothing more beautiful than the expansive flat plains of western Kansas. Despite this seemingly arbitrary nature of personal opinion, there are some largely agreed upon characteristics that combine to make a pleasant natural environment: mild climates, presence of surface water and topographic variation. The US Department of Agriculture used these general characteristics to develop a composite natural amenity index for all counties in the lower 48 states, and the analysis in this chapter utilizes the USDA natural amenity index as its primary amenity measure. (In a similar fashion, Buckley *et al.*, Chapter 18, this volume use an array of factors to identify amenity landscapes in Australia.) The USDA amenity index is a composite measure combining climatic, topographic and surface water characteristics for each county. Data for each measure and for each county were normalized and then the z -scores were summed to calculate the composite amenity score. For details on the specific measures included in the amenity score, see McGranahan (1999). Figure 4.1 presents a map of these amenity scores for counties in the lower 48 states.

There are clear regional variations in the endowments of natural amenities. The western USA is fortunate to enjoy very high natural amenity landscapes, as is Florida. In contrast, the Plains and Great Lakes regions suffer from lower levels of the USDA-defined natural amenities. Despite identifiable variation in the level of amenities between regions, there is also considerable variation within regions. Table 4.1 presents summary statistics for the natural amenity index by region. Each region contains some territory with negative amenities and some territory with positive amenity scores. Even a region like the Great Lakes with the lowest average natural amenity score possesses some high-amenity areas

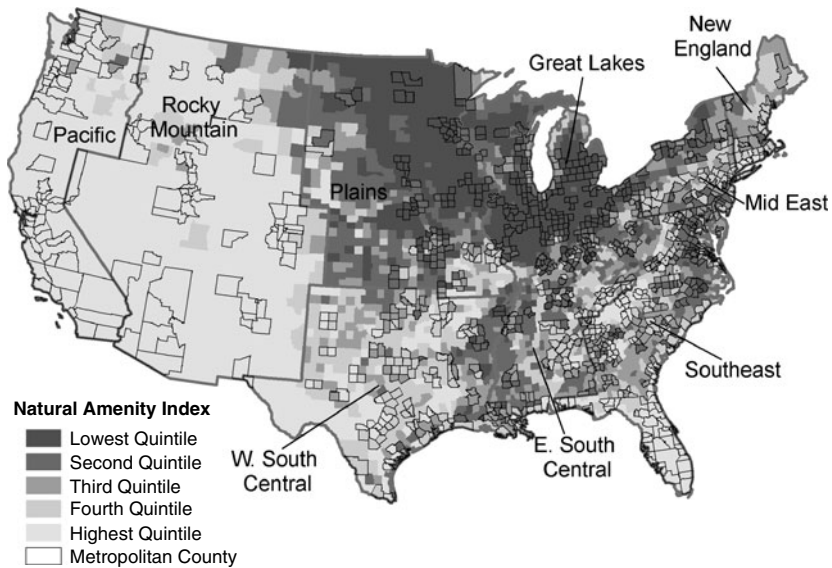


Fig. 4.1. Natural amenity scores by county. Source: Economic Resource Service (1999).

along the coasts of Lake Michigan and Lake Huron. The amenity migration relationship across regions begs further examination in the context of the highly variable nature of amenities, both within and between regions. Are high-amenity destinations attractive to migrants regardless of region, or are amenities within certain regions more attractive than amenities in other regions? If the former is the case, there should be no difference in amenity–migration relationships when controlling for region, whereas if the latter is true, certain regions will

enjoy strong amenity–migration relationships while other regions do not.

Estimating county net migration

The US Census Bureau provides annual estimates of county population and demographic components of change. For the 1990s, these demographic components of change included estimates of net migration. For the 1990s analysis, then, this chapter borrows the net migration

Table 4.1. Summary statistics for natural amenity index by region.

	Mean	Minimum	Maximum	Range
New England	0.64	-1.16	2.89	4.05
Mid East	-0.30	-2.94	1.52	4.46
Great Lakes	-1.87	-5.40	1.05	6.45
Plains	-1.67	-6.40	2.99	9.39
Southeast	0.42	-2.93	6.05	8.98
E. South Central	-0.19	-3.98	2.93	6.91
W. South Central	0.74	-2.79	5.93	8.72
Rocky Mountain	3.04	-3.82	8.52	12.34
Pacific	4.77	-1.34	11.17	12.51

Source: USDA Natural Amenity Index. Available at: <http://www.ers.usda.gov/data/NaturalAmenities/>

estimates from the US Census Bureau (US Census Bureau, 2001b). For the 1980s, the Census Bureau only provides annual estimates of total population, births and deaths (US Census Bureau, 1990). From these data, it is possible to estimate net migration for any county I , over any time period, say 1985–1989, using the following formula:

$$NetMig_{i, 1985-89} = (Pop_{i, 1989} - Pop_{i, 1985}) - (Births_{i, 1985-89} - Deaths_{i, 1985-89})$$

This paper explores the relationship between amenities and migration between 1980 and 1999 at 5-year intervals. For the periods in the 1980s, the analysis uses the formula above to derive estimates of net migration at the county level.¹

Migrants' assessments of amenities and migration decision making

Individual-level migration decision making is a complicated process involving both objective and subjective assessments of costs, risks and returns associated with the move itself. Sophisticated techniques exist for modelling such individual-level migration, and most are predicated on some variation of personal utility (DeJong and Gardner, 1981). In other words, individuals will make a move to a new destination if the sum of personal utility at a potential destination minus the costs of moving is greater than the sum of personal utility at the migrant's origin. In theory, the potential of these personal utility-based models is rich, as a multitude of factors contribute to individual personal utility. In practice, quantifying things like scenic beauty, access to recreation and viable wildlife habitats is difficult at best, yet these place characteristics certainly contribute to personal utility. Therefore, the question of how natural amenities influence migration behaviour at the individual level requires a different methodological approach, drawing on more qualitative techniques.

The final empirical section draws evidence from two separate studies examining recent non-metropolitan migration in the 1990s. While neither study explicitly focused on amenities and migration, both asked a variety of respondents to discuss their motivations for moving to a non-metropolitan destination. The first study

examined migration to rapidly growing communities in the non-metropolitan western USA. This study employed both a survey of roughly 1200 households and in-depth interviews of more than 50 respondents, and both methodologies touched on the migration decision-making process. The majority of the results from this earlier project are reported elsewhere (Nelson, 2001, 2002). The second study's main focus was to examine the role of social capital in business relocation to rural communities in Vermont and employed interviews with business owners in four Vermont communities. Again, we asked questions about migration decision making during the course of the interviews. The responses from both studies touching on amenity characteristics (both natural and social) in migration decision making will serve as the basis for the qualitative analysis that concludes the empirical section.

Results

Regional variations in the non-metropolitan population turnaround

Just as amenities are highly differentiated by region, so too are regional migration streams. Figure 4.2 presents average net migration rates for all counties, metropolitan counties and non-metropolitan counties for the 1980–1999 time periods. There are very distinct patterns of population redistribution evident in Fig. 4.2. First, panel A shows a clear 'rust belt to sun belt' shift, as the Mid East, Great Lakes, and Plains show losses or slight gains while the South East, and the Pacific have enjoyed consistently positive migration gains. Second, Fig. 4.2 also highlights the consistent depopulation of the Plains. Third, as one would expect, the metropolitan experience (panel B) largely mirrors the overall regional experience, since roughly 80% of the USA's population resides in metropolitan territory.

Perhaps the most interesting – and relevant to the topic at hand – migration patterns shown in Fig. 4.2 are found in panel C – depicting average non-metropolitan migration rates. Recall from the literature review how non-metropolitan regions have experienced a variety of booms and

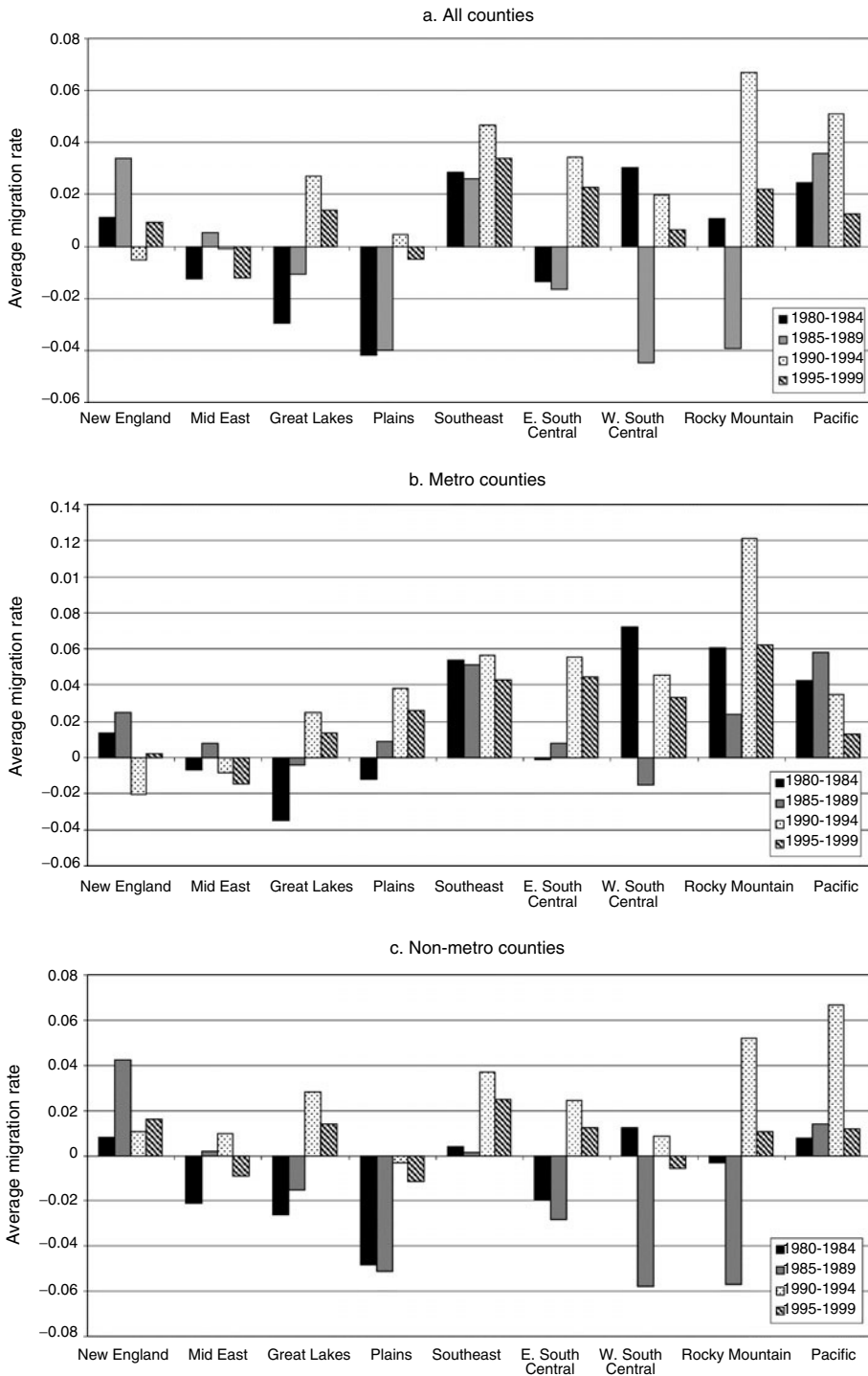


Fig. 4.2. Net migration by region and metropolitan status. Source: US Census Bureau (1990, 2001b).

busts since the 1970s. These ebbs and flows of non-metropolitan population migration are clearly evident in virtually every region. Only New England and the Pacific enjoyed positive average migration rates throughout the entire 20-year study period. Further, with the exception of New England, each region shows a dramatic positive increase in the average migration rate between the late 1980s and early 1990s. While these rates have subsided to some degree in the later 1990s, six of the nine regions still enjoy positive net migration in the most recent time period. The rural rebound of the 1990s was quite widespread. Only the non-metropolitan Plains lost population through out-migration throughout 1990s, but at ever so slight rates, and the Great Lakes and Rocky Mountain regions shifted from dramatic population loss to significant population gains between the 1980s and 1990s.

These shifts in non-metropolitan population across a wide array of regions beg further examination within an amenity migration context. As stated above, people move for a variety of reasons, and despite the rising interest in amenities and migration, economic factors still dominate most explanations of migration. Non-metropolitan migration presents a unique case. Employment opportunities and earning potential are significantly reduced for non-metropolitan residents (Vias and Nelson, 2005). In this light, the resurgence of non-metropolitan migration is probably driven by non-economic factors such as natural amenities. It is clear from the existing body of literature that amenities are playing an increasingly strong role in driving population redistribution in the rural Rocky Mountains. However, the role of amenities in driving the consistent population turnaround in other regions remains unstudied. For example, non-metropolitan New England, while maintaining positive net migration throughout the last 20 years of the 20th century, is the only region not to see an increase in non-metropolitan migration between 1985–1989 and 1990–1994. Is this because the attractiveness of amenities has subsided in this region? Likewise, it is unlikely that natural amenity endowments have changed dramatically in the Rocky Mountain region between the late 1980s and early 1990s. Rather, it is more likely that the relationship between migration and amenities has changed for this region.

The next section utilizes simple bivariate correlation techniques to examine the dynamic nature of the amenity–migration relationship across both time and space. Then, by drawing on more qualitative material from in-depth interviews and open-ended survey responses of recent migrants to New England and the Rocky Mountain region, the analysis broadens the conception of ‘amenity’ to include components that defy quantification.

The amenity–migration relationship – regional perspectives

The relationship between natural amenities and migration is quite distinct through time and across space (see also Buckley *et al.*, Chapter 19, this volume). Figure 4.3 presents a bar chart of bivariate correlation coefficients between county-level net migration rates and natural amenity scores for all counties, metro vs. non-metropolitan counties and non-metropolitan counties by region for the 1980–1999 time period. Contrary to what Ullman professed in 1954, amenities are not becoming more important in driving population redistribution either at the national scale or for metropolitan counties. Figure 4.3 shows decreasing amenity–migration correlations for all counties and for all metropolitan counties.

Contrasting the metropolitan case, the relationship between net migration and amenities is considerably more varied across time and space for non-metropolitan counties. Amenities appear to play a rather strong role in explaining variations in non-metropolitan net migration across virtually every region. Only the non-metropolitan Mid-East and Pacific regions fail to generate consistently significant and positive correlation coefficients throughout the 20-year study period. Furthermore, Figs 4.3 and 4.4 suggest that natural amenities are becoming increasingly important in driving non-metropolitan migration streams relative to the nation as a whole and relative to metropolitan destinations. Overall, amenities were relatively poor predictors of net migration for non-metropolitan regions in the 1980s. During the 1980s, six of the nine non-metropolitan regions had correlations coefficients equal to or below those of their corresponding metropolitan areas. In Fig. 4.4, such cases are

shown as ratios roughly equal to or less than 1.00. The importance of amenity migration for non-metropolitan regions by the 1990s, however, increased considerably. While only the Great Lakes and Rocky Mountains show steady absolute increases in the amenity migration correlation coefficients (Fig. 4.3), throughout the 1990s, Fig. 4.4 shows most non-metropolitan regions (eight of nine) had correlation coefficients higher than those for their corresponding metropolitan areas by the late 1990s. Considering this relative increase in the amenity migration correlations in the context of the widespread non-metropolitan population turnaround of the 1990s, it is safe to say that amenities are becoming increasingly important in driving non-metropolitan migration nationally and within regions.

A few rather interesting regions emerge when one examines both Figs 4.2 and 4.3 simultaneously, and these regions warrant further discussion. First, Fig. 4.2 shows that non-metropolitan New England is one of two regions to maintain positive non-metropolitan net migration throughout the 20-year time period, yet it did not experience accelerated non-metropolitan growth in the early 1990s. Rather, the peak migration period for non-metropolitan New England came in the late 1980s, and this growth is not strongly associ-

ated with high-amenity landscapes (correlation coefficient statistically insignificant and below 0.30). During the other sample time periods examined, New England's non-metropolitan migration streams are strongly directed towards high-amenity regions, as evidenced by the consistently high correlations between amenities and migration in the 1980–1984, 1990–1994, and 1995–1999 periods. Therefore, while the late 1980s represents an anomaly for non-metropolitan migration in New England, the otherwise stable and positive migration towards non-metropolitan areas in New England is directed towards high-amenity landscapes.

The second set of regions showing noteworthy relationships between amenities and migration are the Great Lakes and Rocky Mountains. Figure 4.2 shows these two regions experienced dramatic shifts from non-metropolitan population loss in the 1980s to population gain in the 1990s. The Great Lakes had a shift from migration losses of roughly 1.5% to gains of nearly 3%, and the Rocky Mountains went from losses as low as 5.7% to gains of 5.2% – a 10% turnaround in the span of 10 years. Placing these shifts within an amenity context makes a strong case for an increasing role of natural amenities in these regional migration systems. Both the Rocky

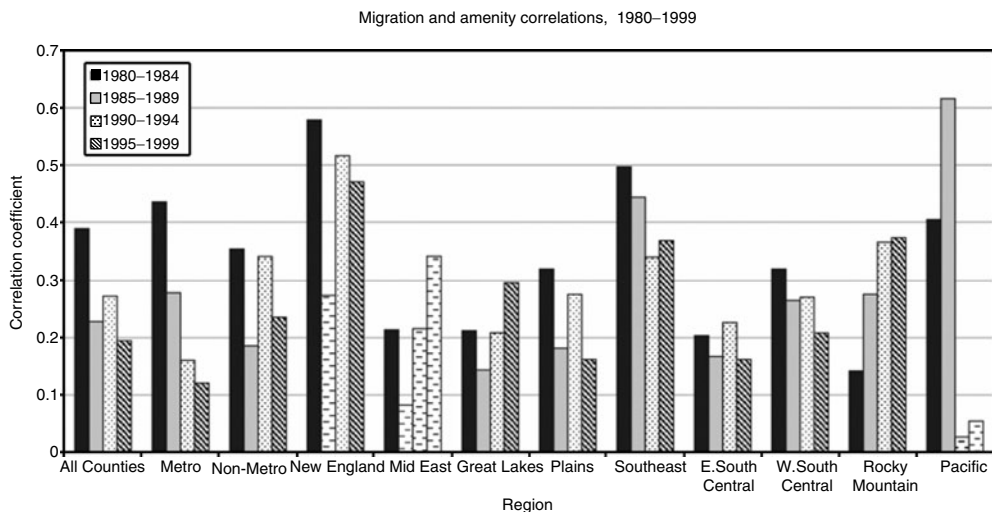


Fig. 4.3. Correlation coefficients between natural amenities and net-migration rates, 1980–1999. Note: Bars shaded with horizontal dashes are not statistically significant at the 0.05 level. Source: USDA Natural Amenity Index, US Census Bureau (1990, 2001b).

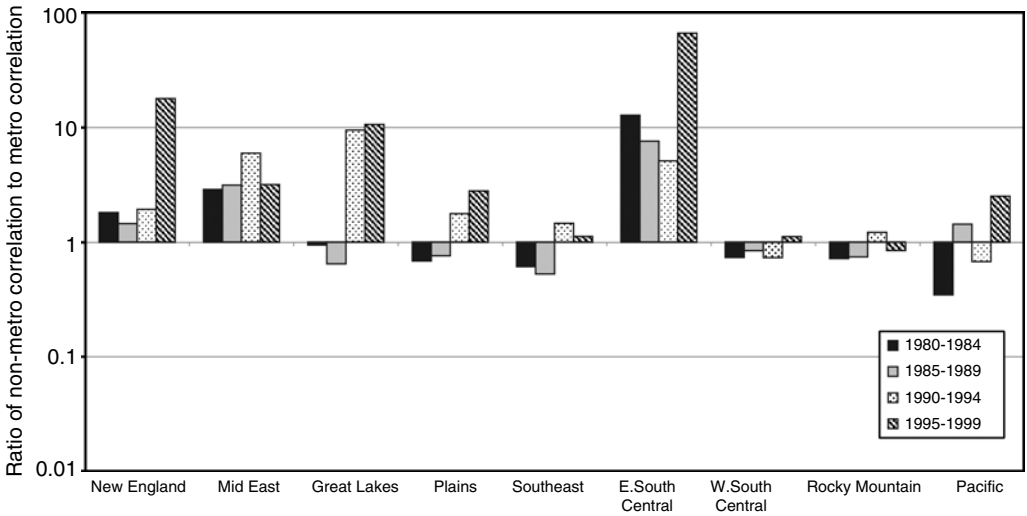


Fig. 4.4. Ratio of non-metro amenity migration correlation to metro amenity migration correlation by region. Source: USDA Natural Amenity Index, US Census Bureau (1990, 2001b).

Mountains and Great Lakes regions show positive and increasing correlations between natural amenities and net migration rates over the 1980s and 1990s. Yet, why do the amenities of New England consistently attract migrants while the high-amenity regions of the Great Lakes and Rocky Mountains have only become attractive in more recent time periods?

The differences between the stable role of amenities in New England’s non-metropolitan migration and the increasing role of amenities in the Great Lakes and Rocky Mountain regions is probably due to the unique geographies of these distinct regions. These unique geographic contexts create different types of amenity landscapes and different degrees of access to such landscapes. Recall that the amenity index combines a variety of climatic, surface water and topographic features into a single score, yet it is possible to examine each of the different components of the index separately. For example, the high-amenity landscape of the Rocky Mountain region is greatly impacted by the heavily mountainous terrain, while the Great Lakes and New England have higher levels of amenities surrounding their shoreline areas. Therefore, the factors that truly differentiate these three regions are surface water and topography. By isolating the role of these

two natural features in attracting migrants, we can provide a more geographically specific understanding of amenity migration (Table 4.2).

Historically, much of the amenity migration worldwide has been directed towards the coasts, yet more recently, mountainous destinations have begun to experience a sizeable flow of amenity migration (Price *et al.*, 1997). Table 4.2 shows that within specific regions, mountainous and coastal/shoreline landscapes are differentially attractive. Mountainous landscapes are clearly not attractive to amenity migrants in New England (negative correlation coefficients), but the coastal areas are. In contrast, mountain destinations are attracting increasingly large numbers of migrants in the Great Lakes and especially in the Rocky Mountains. The relationship is most dramatic in the Rocky Mountain region, as shown in the turnaround in correlation coefficients. Much of the growth in the Rocky Mountains has been directed towards such high-amenity mountain towns like Jackson Hole, Wyoming or Aspen, Colorado. The Great Lakes region occupies a more middle ground. Migrants have been consistently attracted to the shore areas of the region (though not to the same extent as in New England), and in the 1990s there was an increase in amenity migration

Table 4.2. Correlation coefficients between net migration and selected components of the amenity score, non-metropolitan portions (values shown in bold type are significant at the 0.05 level).

	1980–1984	1985–1989	1990–1994	1995–1999
New England				
All components	0.579	0.274	0.515	0.47
Topography	-0.58	-0.06	-0.471	-0.411
Water Area	0.534	0.266	0.517	0.498
Great Lakes				
All components	0.212	0.144	0.213	0.296
Topography	0.102	0.032	0.125	0.135
Water area	0.211	0.203	0.266	0.343
Rocky Mountains				
All components	0.142	0.276	0.355	0.373
Topography	0.017	-0.074	0.339	0.31
Water area	-0.052	0.000	0.077	0.023
Entire US				
All components	0.353	0.186	0.339	0.236
Topography	0.082	0.07	0.264	0.19
Water Area	0.134	0.279	0.170	0.221

Source: USDA Natural Amenity Index, US Census Bureau (1990, 2001b).

directed towards the more topographically varied parts of the region (even though the Great Lakes is not considered a mountainous region).

In addition to variation in the components of these regional amenity landscapes, these regions also possess highly varied settlement geographies, which may contribute to their different historical amenity migration trends. New England is a relatively densely settled region known for its endless supply of small towns with picturesque Congregational Churches on the town green. The region is also home to some rather large metropolitan nodes including Boston, Hartford, Providence and New Haven, and adjacent to southern Connecticut is the massive metropolis of New York. The famed Bos-Wash corridor has its northern origins in New England (Gober, 1999). The result of this form of settlement is that populated non-metropolitan territory is rarely a long distance from a metropolitan core. In other words, New England's non-metropolitan territory is relatively accessible. This settlement geography is quite similar to that in the European Alps described by Perlik (Chapter 15, this volume). Therefore, with the widespread proliferation of the automobile, individuals or households wishing to live in an area with higher amenities can do so in New England, and never be a long way from an urban core for

shopping or employment opportunities. In fact, some of the highest amenity areas in New England (see Fig. 4.1) are rather proximate to metropolitan areas (also typically located along the coastlines). Amenity migrants to rural New England can enjoy the best of both worlds – access to natural amenities by choosing to live in the rural countryside, while also having access to socio-cultural amenities in the nearby cities.

The geographic context of the high amenity in the Rocky Mountains and Great Lakes is quite different. The high-amenity landscapes of the Great Lakes are found mostly in northern lower Michigan along the lakeshores. These areas are quite distant from metropolitan areas within the region. Similarly, while the Rocky Mountain region has fairly widespread high-amenity territory, its population geography is much more concentrated in isolated settlements. Because of the large presence of federally owned lands, the Rocky Mountain region contains vast tracts of unpopulated land, resulting in an interrupted population geography. Therefore, much of the non-metropolitan population in both the Rocky Mountains and the Great Lakes lives at great distances from metropolitan cores, making them relatively inaccessible. The advent of certain information technologies in the 1990s created a greater degree of locational flexibility for certain

segments of the population. Therefore, it is likely that the surge of migration into more remote high-amenity locations in these two regions has been facilitated by these technologies. Indeed, a conceptual framework for examining amenity migration emphasizes the ways in which enhanced transportation and communication technologies increase the potential for amenity migration (Moss, 1994). While no comprehensive study has yet to examine this phenomenon directly, certain related works based on isolated case study analysis suggest this to be the case in the Rocky Mountain West (Beyers and Lindahl, 1996; Salant *et al.*, 1997; Beyers and Nelson, 2000).

Thus far, the analysis has shown that while not the case for all types of territory, natural amenities appear to be growing in importance for non-metropolitan regions attracting mobile populations. Regions with both consistently positive non-metropolitan migration streams (i.e. New England) and shifts from population loss to population gain (i.e. Rocky Mountain and Great Lakes) demonstrate a strong and positive association between natural amenities and migration. The analysis further highlights the value of a geographic perspective in examining such amenity migration. The relationships between amenities and migration as well as the critical components of amenity landscapes vary considerably across regions. The last phase of the analysis shifts scales

from the macro to the micro and explores the role of amenities in the migration decision making of the migrants themselves.

Amenities in the minds of non-metropolitan migrants

Drawing on a combination of quantitative survey responses and qualitative responses to open-ended survey and interview questions, the remaining analytical portion of this paper delves deeper into the minds of the migrants themselves to better understand the ways in which amenities play a role in the migration decision-making process. It is very clear that amenities play a prominent role in the decision making for migrants moving to the non-metropolitan western USA. These results fully support those of earlier work done in the region and cited above in the references. Figure 4.5 presents frequency distributions from a survey of migrants to rural communities in the western USA, and environmental qualities figure prominently in the decision-making process. ‘Quality of the natural environment’ and ‘access to outdoor recreation’ were the two most frequently listed ‘very important’ reasons for making a move to a new residential location. The next most frequently cited ‘very important’ reason was ‘safety,’ another non-economic factor. Only 33%

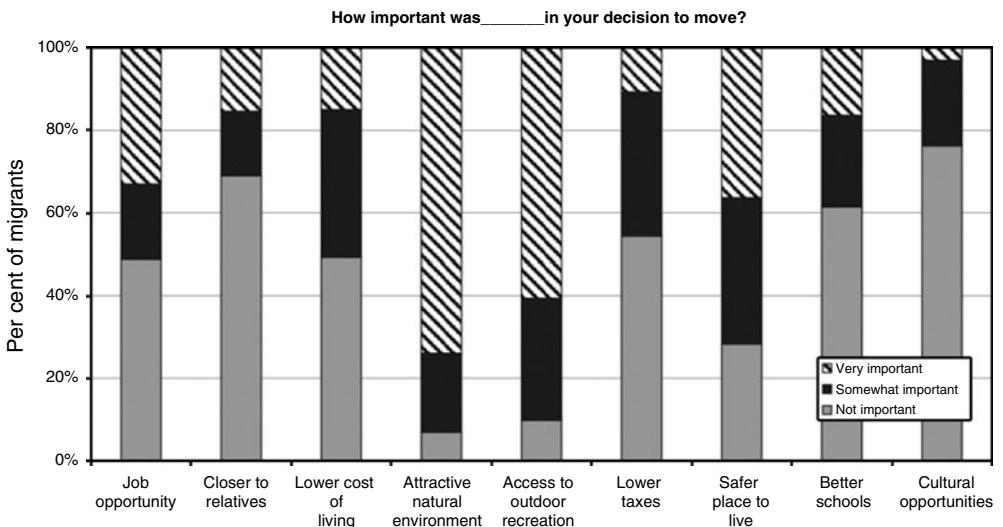


Fig. 4.5. Factors influencing non-metropolitan migration decisions. Source: P. Nelson (2005).

of respondents stated that job opportunities were a very important reason for moving and a mere 15% cited lower cost of living as a very important reason. Clearly, natural amenities play an important role in driving the migration streams into the non-metropolitan West.

Survey respondents were also given the opportunity to express their motivations for migrating through open-ended questions, and a sample of the responses further highlights the prominence of natural amenities in driving these migration systems.

We live where we used to vacation. We vacation where we used to live. NOT BAD!
50-year-old male from Pagosa Springs, Colorado

We moved here because of the remoteness and wilderness of the area.
25-year-old male from Driggs, Idaho

I moved to be closer to the beauty of the mountains.
76-year-old female from Pagosa Springs, Colorado

A 68-year-old male writes that after shopping around in several different communities, he and his wife settled on the Methow Valley in eastern Washington because of its 'secluded nature, scenic beauty and wildlife,' and a 64-year-old female living in the same area listed 'rural character, beautiful landscape and sense of community' as key factors in her migration decision. It is clear from these few interviews and questionnaire excerpts that the natural landscape and natural amenities figure prominently in the minds of migrants to this region, yet the last quote raises a second and equally important dimension of amenities.

This second dimension – sense of community – expands the scope of amenities to include both the natural and socio-cultural components of landscapes embodied by place. While many amenity migrants are certainly attracted to the natural beauty of rural areas, an equally important (though more elusive) factor in the minds of amenity migrants are the social or cultural aspects in their destinations. As people move out of large cities, they often seek socio-cultural characteristics thought to be present in small towns (Hummon, 1990). Such hopes are quite evident in more of the excerpts from the community surveys. A 47-year-old male living in Driggs, Idaho recently moved

there from Laguna Beach, California. Clearly, with its mild climate and access to coastal areas, this individual had ample access to certain natural amenities in California. When describing his motivation for moving to rural Idaho, however, he cites more cultural aspects of the place. 'I moved here to obtain a more relaxed lifestyle'. Similarly, a 57-year-old male migrant from Corona, California to Kanab, Utah is also in pursuit of what he calls 'a rural lifestyle'. While he did not elaborate on the details of this rural lifestyle, one can imagine it resonates with Hummon's description of rural ideology grounded in strong families, safety, familiarity and informality. These sentiments are echoed by a 47-year-old mother of two currently living in the Methow Valley of eastern Washington. Compared with her place of origin (San Francisco), the Methow offers a 'better place to raise a family'.

It therefore seems that both natural and socio-cultural dimensions of place combine to create a composite package of amenities that can attract migrants. In certain places, such as the Rocky Mountain West with its dramatic mountainous landscapes, such natural features may dominate migration motivations. In other contexts, however, socio-cultural dimensions become increasingly important in regions like New England, rich in community history and civic engagement fostered by Town Meetings and the pervasive town greens. In discussing the relocation decisions of a sample of entrepreneurs to rural New England, the intersection of both social and natural amenities becomes strikingly evident.

The town of Cedar River (the names of towns, individuals and firms have been changed to protect the confidentiality of the respondents) is located in the shadow of a major ski resort partway between VT route 100 and Interstate 89. Originally a mill town powered by the Ottaquechee River, today Cedar River is a typical small Vermont town known for its bed and breakfasts and access to the Green Mountains. The original mill structure now serves as a small mall hosting local artisans' goods. Cedar River is also home to medium-sized Panther Brewing, owned by an in-migrant to the area from Boston.

Panther Brewing was founded in the early 1990s during the height of microbrewery expansion in the USA. The founder was originally from the route 128 region in Massachusetts and

was employed as an electrical engineer in an industry heavily dependent upon defence contracts. Consistent with other works on entrepreneurial migration to non-metro destinations, this entrepreneur owned vacation property near Cedar River (Johnson and Rasker, 1995) and enjoyed recreating in the local area. Anticipating a decline in the defence-related contracts and the ensuing recession, the founder of Panther Brewing moved to the Cedar River area permanently in 1989 and officially founded the brewery in 1990. Today, the brewery employs 35 people, making it a relative large employer for the area. The owner cites the high-quality natural environment and access to recreational opportunities as primary reasons for his move to the area.

Panther has survived some of the more recent attrition in the microbrewery industry, and is currently seeking to expand. However, what appears to be a lack of social capital resources is limiting the possibilities for expansion, and currently the founder is seeking alternative locations throughout New England. Social capital is a concept that refers to bonds of trust and reciprocity that exist within certain places and within certain groups. The concept has become quite in vogue of late in the economics and sociology literatures, and was popularized by the now famous article 'Bowling Alone' (Putnam, 1995; Castle, 2002). Social capital can be seen as a critical component to the social amenity landscape of a particular community, yet in the context of migration into small rural communities, such bonds of trust and reciprocity can become challenged (Stewart, 2002). Specifically, the owner of Panther Brewing describes problems prohibiting expansion in the current Cedar River location. These problems relate explicitly to notions of social capital and demonstrate how social amenities (or lack thereof) can further influence processes of amenity migration to rural communities.

In an interview with the founder, he cited a distinct lack of trust between local business owners and Cedar River community leaders. Panther has sought to expand its operations for several years, and each time progress appears to be made, a new roadblock emerges. Permits get delayed. Promises get revoked, and the end result is elevated animosity between the business owner on the one hand and the local governing powers on the other. In part, these problems

probably stem from the owner's newness to the area. Bonds of trust and reciprocity do not simply form overnight. Rather, such relationships often take many years to evolve. Thus, while the natural landscape served to attract the owner of Panther to the area initially, the social landscape (lack of certain social amenities) may cause him to leave the area altogether. Therefore, social amenities and natural amenities appear to be synergistic, as the lack of one (in this case social amenities) may undermine the ability of the other to maintain community attractiveness. Norwalk, Vermont is located along the headwaters of the White River in central Vermont. Home to a large office of the Green Mountain National Forest, Norwalk has historically been dependent on a combination of forest products and agricultural activities. In contrast to the negative case illustrated by the Cedar River example, the story of Greenside Technology Consulting and a related small business incubator highlights the possible positive synergies between natural and social amenities.

In 1990, a couple moved to Norwalk, Vermont from suburban Maryland. The husband operated a technology consulting firm in Maryland that served clients across the country. The wife was also employed in information technology. The couple was very interested in locating in Vermont because of its four-season climate, access to mountains and overall scenic beauty. While virtually the entire state of Vermont offers these natural characteristics, as they shopped for different communities throughout the state, they settled on Norwalk largely because of community social activity and the quality of the schools (note: they did not have school-age children). In the context of this amenity migration discussion, it is important to note that the natural landscape attracted this couple to the region, but the socio-cultural landscape attracted them to the specific place – Norwalk. Examining the couple's pursuit of work in the area further highlights the importance of both social and natural features in creating the conditions for continued growth and successful migration experiences.

The husband was able to effectively move his consulting business to Norwalk and work by himself. His wife, however, was less successful in finding employment and simply supported the

husband's work initially. Through various community gatherings (festivals, concerts, pot-luck dinners, etc.), the couple found similarly frustrated local residents. These individuals started working collectively to try to remedy the situation in Norwalk. The sense of community (trust) fostered through such gatherings attracted the couple to Norwalk and paved the way for collective action as the residents attempted to deal with their employment frustrations.

The solution to the problem evolved over several years. One member of the group had some prior experience in historic preservation, and several buildings in the town of Norwalk were designated with historic status. By accessing state funds for historic structures, the group was able to acquire a building and renovate it to support technology infrastructure. By providing the building with better internet access, and dividing it up into small office spaces, the group eventually created a small business incubator that houses approximately eight firms with on average five to ten employees each. This is a considerable economic effect, considering Norwalk's total population is barely 1100, and undoubtedly this employment increase will attract new migrants to the area. The Norwalk case illustrates the importance and power of social capital or socio-cultural amenities *in the presence of* natural amenities. It seems these two types of amenities – social and natural – are synergistic, as the sum is greater than each of the two parts. The community gatherings, coupled with the natural environment, were critical elements of Norwalk's initial appeal. The gatherings themselves further develop social capital within Norwalk, creating more jobs that will then attract more migrants to the area in the future.

Conclusions

This chapter has explored the relationship between amenities and migration at a variety of geographic scales, ranging from the national level down to the individual migrants themselves. Clearly, natural amenities are becoming more important predictors of aggregate migration flows, at least for non-metropolitan territory. Thus, while Ullman (1954) claimed amenities to be an increasingly important factor in driving regional population streams, the analysis

here somewhat challenges Ullman's assertion. Amenities do not appear to be increasing in importance for movers to metropolitan destinations. Therefore, we must limit Ullman's prediction from 50 years ago to those migration streams directed towards non-metropolitan destinations.

The amenity–migration relationship is also regionally differentiated, as certain regions have enjoyed consistently strong and positive associations between amenities and migration during the past 20 years, while other regions have only recently been able to capitalize on their amenity landscapes. New England's unique settlement geography has allowed its high-amenity landscapes to be accessible to a large number of potential migrants since at least since the 1980s. In contrast, the Rocky Mountains' settlement geography is more dispersed. Only recently have its high-amenity landscapes become accessible through developments in transportation and communication technologies supporting Moss's (1994) framework for amenity migration. Furthermore, the components of an amenity landscape vary from region to region. While New England is dominated by coastal amenities, the Rocky Mountain region is dominated by mountainous amenities.

Finally, the emphasis of the amenity discourse emerging within academic circles has focused heavily on the natural landscape as a key factor in contemporary migration systems. This analysis does not intend to discount such a relationship. The emphasis on the physical environment, however, may be overly myopic, as the brief qualitative section illustrates how the attractiveness of migration destinations with high levels of natural amenities may be challenged in the absence of social amenities like a sense of place and adequate social capital. The attraction of using natural amenities is that variables such as average January temperature and relative humidity are easily measured across vast amounts of territory. It is possible to download meteorological information for all the counties in the country from publicly accessible web sites. Therefore, it is possible to quantify natural amenities and create a composite index as McGranahan has done for the entire country with relative ease. It is then possible (as I have done in this paper) to use such an index in a variety of statistical techniques. When one turns to the socio-cultural dimensions of place, such a task becomes dubious at best. While we can count the number

of social events per year in a community, or the presence of theatres/libraries in particular places, developing a database with these types of measures for an area as extensive as the USA is an insurmountable task. Furthermore, how do you measure trust? Can a sense of community or neighbourliness be quantified? While these community traits are certainly important in understanding amenity migration, at best, they are difficult to quantify. It therefore becomes imperative that amenity migration scholars employ a variety of methodological approaches as they further unpack these complex yet compelling relationships. Other contributions to this volume employ creative case-study-based methodologies in order to better understand these important socio-cultural dimensions of amenity migration.

The road ahead for amenity migration research is rich with potential, as this paper has barely scratched the surface of the complex amenity–migration relationship. Clearly the temporal volatility in natural amenity–net migration correlations needs further explanation. For example, how do fluctuations in the national economic conditions (business cycles) influence amenity–migration relationships? Furthermore, settlement geography and communications technology certainly play a role in the different temporal patterns across regions, but primary research must examine the specific role such technologies play in facilitating the move to remote high-amenity destinations. This analysis has also focused entirely on net migration, yet net migration is a

composite of in- and out-migration (Rogers, 1990). A place can have large amounts of in-migration attracted to amenities but very little net migration if there is displacement leading to out-migration, and anecdotal evidence suggests that many high-amenity regions experience a considerable amount of population turnover (Beyers and Nelson, 2000). Are there differences in the relationship between natural amenities and net- vs. gross-migration streams, and if so, why? Lastly, the intersection between natural amenities and socio-cultural amenities requires specific research methodologies designed to examine such relationships simultaneously.

Notes

¹ It is important to note that in the 1980s, these estimates of net migration will include migrants from both domestic and international origins. In the 1990s, the estimates are for only domestic migrants. While it is possible to include immigration from abroad in the 1990 estimates to make them more compatible with the 1980s figures, such a process would cloud the broad conceptual question guiding the analysis for two reasons. First, immigration from abroad is much more likely to respond to economic motives rather than amenity characteristics. Therefore, including immigration from abroad in the 1990 analysis would likely confuse the results. Second, immigration from abroad is still largely an urban phenomenon, and amenity migration in the USA is more significant for non-metropolitan migration streams.

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5 Santa Fe, a Fading Dream: 1986 Profile and 2005 Postscript

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Introduction

This essay on amenity migration in Santa Fe, New Mexico, USA has two parts. The first is an abridged version of *Santa Fe, New Mexico, a Late Modern Amenity-based Economy: Myth or Model?*, written in 1986 by Laurence Moss to outline the factors and forces behind the town's growth and change, and its likely future. The second part of this chapter is a postscript written by Romella Glorioso, describing the scenario that has unfolded and focusing on the failure of public policy and planning to guide growth and development. The 1986 profile focused on Santa Fe City and its immediate environs and the 2005 postscript follows the locus of growth further into the surrounding landscape of Santa Fe County.

1. Santa Fe, New Mexico, a Late Modern Amenity-based Economy: Myth or Model?

Santa Fe in 1986: an amenity migration profile

Santa Fe, the capital of New Mexico and the second oldest capital city in the USA (1609), sits at 2121 m elevation, nestled against the 3600 m high Sangre de Cristo Mountains. Located up off the hot south-west desert, it has four distinct seasons, including winter snow. Annually, there

is an average of 300 days of sunshine and 32.51 cm of precipitation. It is a visually pleasing settlement of predominantly Hispano-Indian *fauve* vernacular style buildings, still principally orientated to its central plaza. The buildings' dominant brown tones and gently rounded lines are balanced by high colour in their architectural details, typically turquoise, and the greens and mauves of the hilly terrain and a vast blue sky.

It is not a small town: 52,000 people in a county of 81,500. It maintains a predominantly rural, small-town ambiance, which is beginning to be compromised by newer high-rise hotels (21 m maximum) and peripheral strip development. The rural feeling comes in part from the small size and pedestrian scale of the historic centre, the local architectural style predominating throughout the City and the strong tribal and folk ethnicity of the local people (their values and behaviour, costume and wares). The surrounding region is the site of ancient American Indian cultures, 400-year-old Hispanic traditions and a frontier, or Western-flavoured, culture of Anglo settlers. Over half the population is Spanish surnamed and the region's large American Indian population is quite evident. The latter sell their arts (jewellery, weavings, pots, sculpted figures) spread out on the pavement before the old colonial Governor's palace and on street corners, reminiscent of an earlier historical period or a Third World scene.

At the same time, elegant urban showrooms display these ethnic objects along with

contemporary Anglo arts and hybrids of both. Style, medium and quality varies. Mixed in are clothing boutiques, from traditional ethnic and Western to sophisticated urban. Again with all types of hybrids. Added to this are antique and other retail shops and a variety of restaurants – northern New Mexican, Japanese, French, etc. The town boasts of 200 restaurants and 575 retail establishments, including about 150 art galleries.

The older ethnic cultural expressions still seem to dominate Santa Fe, giving it an exotic character. Besides the people and their visual arts, there are the American Indian and Hispanic spectacles, such as the Indian Market (Fig. 5.1) and the *Fiesta de Santa Fe*. The town also has an established reputation for historical and contemporary ‘Anglo arts’. Artists like D.H. Lawrence, Georgia O’ Keefe and Eliot Porter are closely associated with it. Last year, Santa Fe ranked only below New York on the list of US cities with the highest art-related sales. The city’s opera is reputed to be one of the best in the country and, along with the town’s other serious music events, draws audiences from New York, Los Angeles and abroad. Writing and dance reportedly thrive. The town and its environs also have nine museums, ranging from a renovated rural Spanish hacienda to an institute of modern art. The latter’s collection still pales in comparison to public collections in Dallas, Los Angeles or New York,

as the strong attraction here is the town’s tribal and folk art museums.

The City’s amenities are enhanced by the considerable physical beauty of its surrounding mountains, forests and waterways, which support both passive and active outdoor leisure activities. In addition, Hispanic villages, Indian pueblos and archaeological monuments, ancient cliff dwellings in particular, accent the natural landscape with cultural attractions.

The town itself had some 3800 tourist rooms in 1986. While no one seems to be counting carefully, it was estimated by the Director of the Santa Fe Convention and Visitors Bureau that some 1.5 million tourists visit Santa Fe annually. The following data were obtained from the City Planning Department. In 1984, 25.5% of Santa Fe County’s population was employed in services, 22.8% in trade and 29.8% worked for government. Between 1974 and 1984, those employed in services increased by 68%, trade by 65% and government by 49%. The reduction in mining, an important employer historically, was also significant: falling from 20% to 0.5% of the county’s employed in 1984.

There was agreement among the local people I interviewed that the combination of cultural and environmental resources or amenities has been key to Santa Fe’s success as a place to visit or reside, and as a location of economic activity.



Fig. 5.1. Pueblo Indian pottery for sale at Santa Fe’s annual Indian Market (photograph L.A.G. Moss, August 1986).

It is its cultural resources in particular that has made Santa Fe unique, but there was a divergence of views on whether the town will be able to continue to rely on this amenity.

From the above employment statistics, it is obvious that government plays a significant role in Santa Fe's economy. The town is the seat of the state government, and the US federal government plays an important role in New Mexico's economy. It is a poor state. In a 1985 list of states' per capita income, New Mexico ranked 41st. A large state with only about 1.3 million people, it is fifth in line for federal grants. It also ranks 46th in terms of non-agricultural industry. To an important degree, this reflects its predominantly low-income Native American and Hispanic populations. In addition, numerous public parks, monuments and museums require public expenditure.

However, these recipients also generate income. Unfortunately, it appears no one has done a benefits/cost or similar analysis of this socio-economic condition for Santa Fe City or County, the northern New Mexico region or the state. But it is apparent that government spending in and around Santa Fe is partially responsible for the maintenance and development of the cultural resources and natural environment, which in turn produce the amenity and other products that Santa Fe 'markets'. It should also be noted that, historically, private persons and institutions have also expended funds to maintain, revive and otherwise stimulate the ethnic art of the region, for personal profit, scholarly and philanthropic reasons. This appears to be a complex story involving four actors: collectors/humanists, dealers/tourism promoters, scholars/anthropologists and local artists (Wade, 1985).

Tourism is the most visually obvious generator of income and employment in Santa Fe, although it is not broken out in the available statistics. As the head of tourism for the State of New Mexico pointed out, the principal state policy and administrative organ is the Economic Development and Tourism Department – one department.

I now wish to outline some useful distinctions and issues related to understanding the 'tourism sector' in Santa Fe, beginning with a few words about the more traditional economic sectors. Mining and food production, especially beef, were important to the State, but in the main they can no longer compete in the market

place, as the prices of competitors are cheaper. Oil seems to be in trouble primarily for the same reason. Manufacturing was never of importance to the State, and in 1984 it accounted for only 7.3% of its employment, and 4% of the employment of Santa Fe County. Based on patterns of manufacturing activity elsewhere in 'post-industrial' North America, and the high amenity level of Santa Fe, it was not surprising to learn in interviews that its amenities, especially culture, climate and natural environment, were identified as a primary reason for some hi-tech manufacturing and other knowledge-intensive activities migrating to the town and its environs.

This information led me to look more closely at what was being called 'tourism'. The considerable construction of new housing in Santa Fe and related rapid increases in the price of commercial and residential property from a few years ago prompted the questions, how long do tourists stay, and what is the relationship between tourism and residence? The answers from the Santa Fe interviews suggest that a more complex pattern of mobility is occurring.

The average tourist's visit to Santa Fe is for 24 hours. Many come for the seasonal spectacles that last a few days, the most celebrated being the Indian Market (2 days), the Spanish Market (2 days), and the *Fiesta de Santa Fe* (3 days). Other main attractions occur near by, such as the Eight Northern Indian Pueblos Arts and Crafts Show (ENIPACS) (2 days). As an indication of the economic impact of these events, the City's Chamber of Commerce informed me that the 1986 Indian Market sales amounted to about US\$3.5 million, with a high regional multiplier of some US\$30 million. The smaller 1986 ENIPACS generated approximately US\$2 million. In addition, there are ethnic festivals and ceremonies in and near Santa Fe throughout the year. The principal 'high culture' attractions are the Opera of Santa Fe, the Orchestra of Santa Fe, Santa Fe Chamber Music Festival and the Santa Fe Desert Chorale, all offering seasonal activities lasting a month or more.

These longer-lasting spectacles also attract tourists for longer periods of time. However, all these events, along with the more general appreciation of Santa Fe's cultural and natural amenities, attract sojourners who rent accommodation or purchase residences and stay for an event, a season of events or longer. The residential property

owners both come and go intermittently throughout the year, or reside more permanently. They and absentee property owners also speculate in local real estate. But many, perhaps most of these longer-staying migrants, are not tourists *per se*. Closest to the common definition of the tourist are those who rent for a season, the summer for example. Then there are the owners of second residences who are there in the summer or some other intermittent period and reside permanently elsewhere. Others are there only part-time as well, but they consider Santa Fe their primary residence. At the other end of the spectrum are retirees and other migrants attracted to Santa Fe's amenities to reside on a full-time basis. Their income originates from outside the town or region, or from local employment. All these amenity-motivated migrants, intermittent or long term, I call 'amenity migrants'.

The City, County and State have very little information about these migrants, and even less about their impact on Santa Fe. In general, it is believed most of them do not earn an income in Santa Fe, but are either spending savings or earning their income elsewhere. For the State as a whole, it is believed that the retirees who come are the poorer ones, many of whom live in mobile homes; New Mexico generally does not receive the wealthy retirees that neighbouring Arizona does. Santa Fe appears to do much better. Santa Fe County's median family income in 1984 was US\$24,500; the State's about US\$19,000. As a condominium in late 1985 sold for US\$250,000 (US\$65,000 a decade earlier), it is generally thought the wealthier 'coupon clippers' can afford to live in Santa Fe, while the poorer retirees and 'step-downs' (those who have reduced their standard of living to move to the region) live in the small towns or by-ways. But all are reputedly there for the physical beauty, the predominantly ethnic character and leisure lifestyle, which many imitate.

Those who seek employment in Santa Fe were characterized by interviewees as two types: the low-incomed, who provide the more labour-intensive, low-skilled services, and the well educated, some commanding high incomes in the knowledge-intensive sector, while others work for much less in the service sector. In the short time available for this research I was only able to develop limited information about the town's knowledge-intensive activities, and perhaps some

useful speculation about its relationship to Santa Fe's amenities.

The knowledge-intensive sector of Santa Fe's economy may be divided into two activities: hi-tech manufacturing and the learning industry. Both, but especially the former, are as yet not very significant. People involved in these activities, especially those with capital, have been locating in Santa Fe only very recently, and apparently to a great extent come mainly for its cultural and natural amenities. The Los Alamos National Laboratory, 20 km away, has been generating, and is expected to generate more, hi-tech manufacturing employment in the Santa Fe area, similar to the Stanford Research Institute's impact on the Santa Clara Valley, California. However, the continued location of such activity in or around the town should not be thought inevitable and is discussed below. Perhaps more thought-provoking is the other knowledge-intensive component emerging as potentially important to Santa Fe – the learning industry.

One initially thinks of traditional educational institutions when considering learning, but this is not the significant aspect of this Santa Fe story. While there are seven formal institutions of post-secondary education, more important are the alternative learning institutions. Their activities are focused on areas where the traditional institutions are only beginning to tread or are not venturing, and do so at levels the traditional institutions do not as yet, comprehending emerging late modern societal wants and needs. They also appear to be less encumbered by the bureaucratic and heraldic paraphernalia of formal academia. Those in Santa Fe seem to have both an unusually large number and considerable breadth of interests, and at their core is personal and societal, physical and spiritual development and betterment. Most have been established in the past few years.

Santa Fe's Future: Where To and How?

There is little data about the City's growth and development and the futures analysis undertaken to date is nil. I have therefore outlined here three perspectives, each reflecting a cluster of findings from my interviews, supported by the

documentary information available. They are not future scenarios, as they have not been formulated from rigorous, structured multiple scenario analysis, have internal consistencies and they are all rather partial pictures. Nevertheless, they may offer some insight. I refer to the three perspectives as: (i) *all's well, more of paradise to come*; (ii) *it's coming apart, spiralling down to honky-tonk*; and (iii) *some problems, but solvable*.

All's well, more of paradise to come

Santa Fe will continue to be a beautiful, ethnic and high-culture centre with a 'small town' tempo, attracting predominately the wealthier and more cultured, who are also environmentally conscious as well as discerning of a 'quality lifestyle'. These newcomers, whether tourists or amenity migrants, bringing employment or previously saved income, will respect and maintain the town's way of life. It is thought Santa Fe has an innate ability to reject the vulgar and cope with growth.

City and State tourism promotion officials, and Chamber of Commerce officers, thought that the town's resilient strength lies in the protective instincts of both its old and new residents. The latter are attracted to Santa Fe by its lifestyle, assume it and fight for it. They emulate the older residents. These, along with other protectors of what makes the town attractive, control the decision-making apparatus: city council, planning board and Chamber of Commerce, etc. Although the city's tourism advertisement campaign this past year (1985–1986) admittedly did aim at a broader income base, quality will not be forced out by quantity. There is no ceiling to Santa Fe's carrying capacity in terms of the number of tourists or new residents. As one State tourism official said: 'With vision and image, like Paris, Santa Fe can continue to grow with and attract tourism'.

What about public planning for the future? It was stated that no public or private guiding strategy is necessary. But several helpful projects and programmes were identified: the Visitors and Conventions Bureau (VCB) was proposing conferences (distinct from 'conventions') as a new visitor focus. In doing so, the city will concentrate on meetings of the type of professionals who

allegedly appreciate the Santa Fe-type ambience, 'such as doctors and scientists'. A new 2000- to 3000-seat conference centre was being proposed as part of this tactic, and a similar-sized performing arts centre was also being considered. To alleviate the high-season visitor crushes the town experiences, along with the objective of reducing the considerable variation in the town's income during a year, a new emphasis was being placed on winter activities. The VCB Director identified two other 'compatible groups' which had not been targeted previously – honeymooners and the Japanese.

The business community particularly emphasized maintenance of Santa Fe's amenities by controlling the city's physical conditions by zoning and building codes, especially design codes. In addition, the knowledge-intensive sector potential was stated as considerable and will balance tourism and help maintain amenity quality. Los Alamos needs to expand but has no room, so the obvious choice is Santa Fe – next door, with the 'type of environment such people appreciate'. 'Leakage' of income earned from tourism by the town's enterprises was thought to be probably small compared to other places, as the hotels in the main are locally owned, and new large hotel chains now do not own, but operate. While it was agreed that the cost of living was increasing and this may be a particular hardship on lower-income people, no ameliorating action was suggested. Also, neither did there appear to be a systemic understanding of the role of amenity migrants, nor did I discern an interest in this subject.

It's coming apart, spiralling down to honky-tonk

In this perspective tourism will remain the focus, and the more of it the better. The City and State advertise more, more tourists come, more hotels, boutiques and the like are built, then more advertisements are resorted to, and so on. But with every cycle, the region will have fewer tourists who are aware of what the town 'is really about' and who are sensitive to maintaining its amenities. Rather, increasingly the tourists will be primarily interested in having been to an 'in place'. Progressively they have less time and less money

and buy cheaper services and souvenirs. This is not what Santa Fe does well or from which it has obtained its reputation.

The head of Santa Fe's planning department, and other local professional planners and analysts, stated that it was time to undertake serious and comprehensive analysis about tourism's future in Santa Fe. It should address the regional situation, northern New Mexico, and should begin with developing an understanding of the relationship among amenities, culture change, old and new economic activities and social well-being. Persons of this opinion, however, said those in power either did not want to spend money on this activity or are unaware of the need. They went on to point to other 'fragile' cultural and natural environments that have been destroyed by tourism, such as the Napa Valley in California. However 'there isn't the local awareness to combat the rot, if in fact it is possible to combat'. There was little understanding of migration for amenity as a phenomenon.

What about the alternative income-generating activities to replace or balance tourism, which seem to be emerging in and around Santa Fe; in particular the potential of the knowledge-intensive sector? The high and increasing cost of living, especially land and housing, was pointed out, along with the beginning of the realization that Santa Fe's quality of life is being seriously eroded by the pressure of mass tourism and growth in general. It was suggested that these conditions are now stopping the location of hi-tech and other knowledge activities in the town, and so Los Alamos' spill-over and spin-offs will go 100 km further south, to Albuquerque. The Director of the City Planning Department noted that Santa Fe people like to think that Albuquerque is *gauche*, but it has attractive residential areas, is less expensive, has a large, well-connected airport and more space to develop. The learning institutions in particular will move on as they and their clients perceive the City's eroding amenity level slip below their rather high threshold of contentment.

Public planners and people in the learning industry interviewed, as well as some of the literature about Santa Fe, drew particular attention to the social impact of the town's high and still-increasing cost of living. It was thought this was mainly the result of the influx of tourists and

higher-income in-migrants. It was also observed that many of the businesses (hotels, galleries and land development firms) in Santa Fe were owned by 'outsiders' and the profits from these enterprises left the area. Therefore, the actual local multiplier effect was low.

J.B. Jackson, a well-known environmental historian and long-time New Mexico resident, commented that between the degradation of the amenities, due mainly to their crass commercialization by and for outsiders, and the competitive attractiveness of other culture-based towns and regions, Santa Fe would soon lose its appeal and 'spiral down to just another honky-tonk cowboy town'. Others holding this view hoped that the demise would occur quickly, so that the regional First Nations and Hispanic cultures in the hinterland would not be irreparably damaged.

Some problems, but solvable

This perspective is less internally consistent than the previous ones, and has two key differences within it: (i) there will be a continued watering down of cultural authenticity within a general lowering of the quality of amenities, but Santa Fe will remain comparatively attractive; and (ii) there is local awareness of this threat and action will be taken to stabilize and even improve the natural and cultural resources of Santa Fe.

Interviewees proposing the first condition thought the community can do little to stay the degradation, as there is no local tradition of strong community interference in the *laissez-faire* political-economy that governs the town and region's development. Those professing the second condition felt that there is a local tradition of public action and that, if the State and municipal governments do not take action to study and plan for the sensitive maintenance of the region's amenities, American Indian and small Hispanic mountain communities, along with their 'urban neighbours', will join together to force government to act. They will also act on their own. Two public planners pointed out that the latter had already begun. Several Santa Fe neighbourhoods are organized against developers changing them, and several Hispanic villages further north had rejected ski developments and were attempting to undertake small-scale, local, culturally sensitive

development themselves. Also, the Indian pueblos were beginning to assess the impact of tourism on their communities and were demanding a more direct role in the State's tourism planning. The Vice President for Development, College of Santa Fe, reported that some local organizations are attempting to reinvigorate Santa Fe's ethnic festivals, their problems thought to result from the loss of local control and participation. Also, to protect local culture and part of the direct income it generates, national legislation was being proposed by a local congressman to insure that arts and crafts being sold in the region's markets were local products, not made by the 'Hong Kong tribe'.

Related to both the continued use of local cultural resources and a better distribution of related income, greater penetration of tourism was being suggested through 'back-roads tourism', which will take the traveller into the smaller communities of the region. Promoters of this type of development were the same as those who believed more sensitive and sophisticated public tourism planning will evolve for the region. Common to this perspective is the belief that Santa Fe and its region will develop a more balanced economic base through greater understanding and integration of tourism, knowledge-intensive industries, art making and agricultural production. However, it was felt that both the decline in the quality of amenities and income distribution problems would probably increase for several years before such an improvement would occur. The role of amenity migration was not mentioned, nor was any particular interest in it expressed.

Driving forces

Despite the limited information available about Santa Fe, and the incompleteness of and some inconsistencies in the above description, three key forces appear to be driving change in Santa Fe.

1. The town's and region's tangible and intangible cultural resources.
2. The town's and region's natural environmental resources.
3. Post-industrial societies' emerging economic activities and related needs and wants for cultural and natural amenities.

All three driving forces present opportunities for Santa Fe, but the third one appears to be threatening both its own and the other two's opportunities. It seems there is lack of understanding on the part of the community and its leaders of the larger development process they are involved in. In addition, there appears to be an inappropriate set of skills in City, County and State public offices to adequately analyse and guide the type and magnitude of growth and development that is occurring. This condition has allowed negative manifestations of the third driver to jeopardize the town's positive attributes.

Santa Fe appears to be at, or rapidly approaching, a watershed for maintaining the natural and cultural amenities that have attracted people to it. To manage them more skilfully for their own and the town's benefit, Santa Fe needs to know much more about the causal relationship among the three drivers. Subsequently, management must be put in place that is considerably more strategic and comprehensive than the present focus of public and private decision makers on the physical characteristics of amenities. Santa Fe also needs to understand the interrelationships among three key regional post-industrial economic activities – amenity migration, knowledge-intensive industries and the arts. There is also a critical need to shift from the present narrow focus on tourism.

Culture has played a primary role, if not the predominant role, in Santa Fe's economic success to date. However, somewhat surprisingly there appears to be very little understanding of, or wish to understand, the structural relation between this attribute and more generally Santa Fe's economy. Also, this subject has had little analytical attention from the State of New Mexico. In Santa Fe, cultural amenities are recognized as important, but commonly viewed as a free good. Their continued existence, availability or disappearance typically seems to be assumed: their continuance and use not carefully considered and managed. The seeming result is a decline in both quality and quantity.

Several other key characteristics of the Santa Fe condition are apparent. While the City and State wish to attract, and are attracting, global attention, public and private bodies, most importantly from a resources planning perspec-

tive, demonstrate very little awareness of its strategic global environment. Neither the State nor the City has a process in place for analysing it, even the narrow competitive market environment. In addition, the very little tourism planning being done at the State and City levels appears to be too short run, with a 3 to 5 year horizon. There is little or no assessment of the economic and socio-cultural trade-offs of the actions they undertake or promote. This was most obviously demonstrated in both the promotional activities of the state and town to increase tourism and their lack of attention to the amenity migrants. While such analysis is difficult and imperfect, it is necessary. This is especially true for the town of Santa Fe, where there appears to be a reasonably high consensus on the value of local cultural and natural amenities and a desire to maintain them.

Santa Fe, an amenity-based economy, is not a myth. And as a model, even this limited analysis suggests its condition has important lessons to teach. However, like all models, these lessons are partial and fall short as a handbook in charting future courses for others.

2. Santa Fe in 2005: Failing Public Policy and Planning

Introduction

In the above narrative written 19 years ago, Moss described three perspectives on the future of Santa Fe. As a student of amenity migration (Dimaculangan, 1993; Glorioso, 1997a,b, 1999, 2001, Chapter 18, this volume; Moss and Glorioso, 1999), an amenity migrant to Santa Fe in 1993 and a former Santa Fe County community planner, it is clear that *It's coming apart, spiralling down to honky-tonk* has been and is still a reasonable characterization of the Santa Fe bioregion. Jobses (2000) in his study of rapidly growing smaller towns in high natural amenity areas of western USA arrived at a similar conclusion: that the future of these towns is continued growth, resulting in environmental destruction and the loss of most of their social structure. The following analysis shows Santa Fe to be well along this path. For key points of reference during approximately the past two decades, see Table 5.1.

Santa Fe's amenity-driven rapid population growth

The population of Santa Fe County (the County) (which includes the City of Santa Fe) has grown enormously and very rapidly. Based on the 2005 County population estimate of 141,000 (City of Santa Fe Land Use Planning Department, 2005), due mainly to in-migration, its population almost quadrupled since 1950, more than doubled since 1970, and increased by almost 45% since 1990. But unlike in the 1980s, when 64.8% of the County's population lived within the City of Santa Fe (the City), by 2000 only 48.1% did. A study of the economic impact of a City of Santa Fe growth rate ordinance showed that the population is increasing at faster rates with greater distance from the City, out into the County (BBER, 2002).

Santa Fe real estate advertisements reflect the information collected by Moss on motivations for moving to Santa Fe (Moss, 1986, 1994; Price *et al.*, 1997). Natural and cultural amenities are the key motivation and the focus of the advertisements: beautiful mountain scenery, rural lifestyle, rich cultural traditions, distinctive architecture, a gateway to New Mexico's Pueblo Indians and historic Hispanic villages, mild climate, a national and international centre of the arts and a world class tourist destination, etc. – all within minutes of downtown Santa Fe, 'The City Different'. Moreover, Santa Fe has been marketing these amenities for decades (Fig. 5.2) (Moss, 1994; Wilson, 1997).

These attractions indicate why so much growth in the County is concentrated within some 50 km of the City. The land developments to accommodate this growth have occurred in a relatively rural ambiance that increases with less density and distance from Santa Fe. They are usually surrounded by considerable vacant or forested lands owned by the public, Pueblo Indian Nations, non-profit organizations (NGOs) or private large landholders, such as ranchers, and have collectively been referred to as 'borderlands' (Knight and Clark, 1998). Flora and fauna and scenic vistas are abundant, and generally, with the exception of older, rural communities, these developments have high standards of urban public facilities and services. This type of land develop-

Table 5.1. Salient growth and development characteristics for Santa Fe, NM, USA: mid-1980s and first half of 2000s.

Indicator	1984–1986 ¹	2000–2005
Population		
• City	52,000 (1985 estimate)	65,800 (2005 estimate) ³
• County	81,500 (1985 estimate)	141,000 (2005 estimate) ³
Art galleries	150 (1986)	218 (2005) ⁴
Art sales		
• Eight Northern	US\$2 million (1986)	N/A
Indian Pueblo		
• Indian Market	US\$3.5 million (1986)	US\$19 million (2001) ⁵
Average selling price for single-family house		
• City	US\$105,000 (1982) ²	US\$378,374 (1 st qtr 2005) ⁶
• County	N/A	US\$407,468 (1 st qtr 2005) ⁶
County employment	(1984)	(2004) ⁷
• Government	29.8%	34.04%
• Services	25.5%	40.48%
• Trade	22.8%	12.63%
Educational institutions		
• Post-secondary	7 (1986)	11 (2005) ⁷
Median family income		
• County	US\$24,500 (1984)	US\$54,187 (2005) ⁸
• National	US\$19,000 (1984)	US\$52,680 (2003) ⁹
Museums	9 (1986)	15 (2005) ⁴
Restaurants	200 (1986)	270 (2004) ¹⁰
Retail establishments	575 (1986)	704 (2002) ¹¹
Spanish surname	More than half of the population (1986)	Hispanic/Latino population 48% (2000) ¹¹
Tourists	1.5 million (1986)	1–2 million (2004) ³
Tourist rooms	3,800 (1986)	5,600 (2004) ³

Sources:

- (1) All data except where noted are from Moss (1986); see part 1 of this chapter.
- (2) *The Mayor's Task Force on Affordable Housing* (1983) City of Santa Fe, New Mexico.
- (3) City of Santa Fe Land Use Planning Dept. (2005) *Santa Fe Trends*. City of Santa Fe, Santa Fe, NM.
- (4) Santa Fe galleries, art dealers and museums. Available at: www.collectorsguide.com/sf/sfall.html (accessed 5 January 2005).
- (5) Zeiger, D. (2004) New Mexico arts: nurturing the State's economy. WESTAF, Denver, CO.
- (6) State of the market. Available at: www.french-french.com/company/newletter.html (accessed 15 April 2005).
- (7) Santa Fe Economic Development, Inc. (2005) *Snapshot Spring 2005*. SEDI, Santa Fe, NM.
- (8) Grimm, A. (2005) Home, sweet home. *The Santa Fe New Mexican* 15 April, A1, A9.
- (9) USA statistics in brief. Available at: www.census.gov/statab/www/income.html (accessed 15 April 2005)
- (10) Dex Media, Inc. (2004) Official Directory. Dex Media, Inc.
- (11) Reynis, L.A. (2004) *Santa Fe Living Wage Baseline Study*. BBER-UNM, Albuquerque, NM.

Come and Build With Us!

We Are Building a City Different!

Great is the Satisfaction of Making Real a City of Dreams.

Rooted in the Ancient Past, Nurtured by Mountain, Forest and Desert, Blessed with Sunshine and Health, our Santa Fe is the Goal of Artists, Writers, Musicians—all Those who take Joy in Creating Beauty.

The Santa Fe Chamber of Commerce

CHARLES E. DOLL, *President* ADOLPH J. FISCHER, *Secretary*

Annual Membership Fee Fifteen Dollars.

Fig. 5.2. Santa Fe, New Mexico, USA. Promotional advertisement of 1926. Source: *Laughing Horse*, D.H. Lawrence No. 13 (April 1926) pp. 36.

ment, where rapid and considerable population growth is accommodated by the conversion of vast amounts of natural open space and farmland, is known particularly in the USA as ‘ex-urbanization’ (Nelson, 1992; Davis *et al.*, 1994; Egan and Luloff, 2000; Esparza and Carruthers, 2000). Esparza and Carruthers (2000) argue that traditional approaches to land use planning, particularly ‘comprehensive planning’ and its land use regulations, hastened and spread this ex-urbanization in rural areas of the Mountain West. They point out that Santa Fe County, by using these tools, and especially groundwater availability, to determine residential densities, has contributed significantly to ex-urban sprawl. This is principally because the required minimum lot size for a single dwelling unit consumes a large land area, yet not large enough to truly preserve the integrity of a place. A fuller explanation is illustrative of this wasteful accommodation of land conversion.

The failure of groundwater-based land use zoning

Lot sizes as prescribed by the *Santa Fe County Land Development Code* (the Code) (Santa Fe County Land Use Department, 1980b) are based on hydrologi-

cal analysis undertaken in 1975. From it the County was divided into four hydrological zones with required minimum lot sizes based on a 100-year groundwater supply (40 years in areas closer to the City), and each dwelling unit using 1233 m³/year: Basin Zone (4 ha); Basin Fringe Zone (20 ha); Mountain Zone (32 ha); and Homestead Zone (64 ha). Urbanized Areas and Traditional Communities are exempt. Urbanized Areas (UAs) were established in 1980, principally as locations of denser population development contiguous to the City. Traditional Communities (TCs) were recognized at the same time, from a desire to sustain the particular character of older rural settlements and their historic landscape. Both were allowed much higher residential densities (one dwelling unit per 0.20 to 1.0 ha for UAs and 1260 m³ to 0.30 ha for TCs) due to the possibility of having water and sewer services in the future.

The above minimum lot sizes can be reduced to 25% of their original size by agreeing to limit water consumption to 308 m³/year through strict water conservation measures. These reduced lot sizes can still be further reduced by 50% without further limitations on water consumption through a ‘family transfer’. Family transfer is a land division that creates a parcel that is sold or given to an immediate family member to help families stay

together, which otherwise would not be possible due to the high cost of land in Santa Fe. This groundwater-based zoning may sound rational as it links growth and land development with a key resource in a high-altitude desert environment – water. But as a planner and landscape ecologist, I argue that basing a community's growth and development strategy or formula on a single factor, no matter how critical, is inherently incorrect because there are other key factors that must be considered: additional ecological ones, especially those particular to mountain zones; society's prevailing values and behaviour; local planning and administration's professional capability and budgets; local decision-makers' capability; strategic global factors affecting local communities, particularly the 'new economy', etc. (Santa Fe Economic Development, Inc., 2000; Atkinson, 2002; Müller, 2002; Roberts, 2002; Glorioso, Chapter 18 and Moss, Chapter 1 and 21, this volume). Moreover, these factors are complex, quite uncertain and causally interrelated, and therefore must also be analysed as part of a systemic whole.

In addition, it is illogical and incorrect to treat a living system, such as a growing and developing human settlement, as a closed system, where input (in this case the quantity of groundwater and its recharge) and output (groundwater consumed) are determined with precision, or close to precision. In reality, once pumped out, groundwater's equilibrium is disturbed, resulting in higher variability and uncertainty, and therefore is less understandable (Johnson, 2004). In the important socio-cultural arena, the quantity of water used is affected by prevailing norms. For example, to what extent is water treated as a market commodity or a sacred resource to be used with care and a sense of responsibility towards future generations? If the former, no matter how much water exists, to assume a standard value of 1233 m³ of water/dwelling is at the least insufficient, and, more generally, a critical risk to responsible governance, the ecology and home owners.

On the other hand, to use a landscape or a bioregional context (e.g. watershed) as the planning unit is the responsible and effective way to plan and address ecological and natural resources problems that affect society (Naveh and Liebermann, 1994; Centers for Water and Wildland Resources, 1996; Moss *et al.*, 1999; Duane, 2000; Bissonette and Storch, 2003; Glorioso, Chapter 20, this vol-

ume). Failure to identify other key factors and assess them along with water in an ecosystemic framework has led to significant ex-urban sprawl and related environmental degradation and lost opportunity for the Santa Fe bioregion. There is no doubt of the need to change the Code to one that factors in the complexities of growing human settlements and the capability of their ecosystems to sustain them. In doing so, the following five public management serious weaknesses, which have compounded the above over-arching land use zoning mistake, also need redress.

No planning for amenity migration

Amenity migration is a global change agent that has especially important effects on smaller, more rural communities. If this phenomenon is not considered a key factor in their growth and development policies, it will yield considerable environmental and cultural problems and missed opportunities, especially in mountain zones (see Moss, Chapter 1, this volume). Neither the *Santa Fe County General Plan (GP)* (Santa Fe County Land Use Department, 1980a) nor the *Santa Fe County Growth Management Plan (GMP)* (Santa Fe County Land Use Department, 1999), later referred to as the County Plans, considered managing this phenomenon, whether or not it is referred to as 'amenity migration' *per se*.

The GP (Santa Fe County Land Use Department, 1980a) assumed that 70% of growth in the County will occur in UAs, where infrastructure and services, particularly water and sewerage, were already available in some places and extending them would not be too costly. It also assumed that residents would be 'reluctant to commute far' from established employment centres. However, since 1993, the County knew that this was not the case and that 68% of new residents had located in rural County areas outside the UAs (Santa Fe County Land Use Department, 1999). Although the GMP identified the problems created by the GP, such as allowing 'more growth than projected' (Santa Fe County Land Use Department, 1999:13) without providing the infrastructure needed for such growth, it did not analyse the root of the problem, which is mainly amenity migration. This situation was compounded by key factors not considered in formulating the groundwater-based

zoning: a State of New Mexico law that anyone can drill a well and pump up to 3699m³/year/dwelling (three times the assumed value they used for determining minimum lot sizes); the desire of people to locate in high-amenity places (forests, piedmonts, traditional communities, etc.); the internet advent, which increased the expendability of a face to face interaction for business; and increasing discretionary wealth used to buy bigger homes and lots or second homes as big and comfortable as primary residences (see Flognfeldt, Chapter 16 and Moss, Chapter 1, this volume).

As a result, residential growth shifted from UAs and spread further into the landscape, resulting in even greater sprawl. But most affected were the TCs, which are scattered in the rural landscape with individual wells, and septic tanks and were permitted higher density compared to UAs (see discussion above). Consequently, six out of 19 TCs reached their 'critical population size' (maximum population size for maintaining TCs' attributes based on land and water availability) in 1995, and another five are approaching their limit (Santa Fe County Land Use Department, 1999). Of these 11 TCs, six have been particular amenity migration destinations, and the others have also been experiencing this growth pressure.

Some 50 km north of Santa Fe, the Pojoaque Valley TCs are especially stressed. They lost 40% of their agricultural and open space as residential use increased by more than 85% between 1974 and 1997 (Santa Fe County Land Use Department, 1999). This lowering of environmental quality has been compounded by nitrate contamination of wells from septic tanks, radon gas from gasoline stations, wells and irrigation ditches drying up, extended water recharge time, the need to dig deeper wells and decline in water quality.

Ignoring amenity migration in policy and decision making also gave rise to the prevalence of low-density second homes on large lots in the mountains and their piedmont. They are typically owned by wealthier, seasonal amenity migrants, who exhibit traits common to this migrant type, especially excessive use of local resources, particularly land, water and energy in very large homes (Riebsame, 1997; Shaw, 2000; Colorado Wild, 2002; Glorioso, Chapter 20 and Moss, Chapter 1, this volume). They have become a considerable ecological and socio-cultural problem for Santa

Fe. For example, Las Campañas, a 1920-ha luxury development with two 18-hole golf courses located in the hills north of the City, has less than 500 houses (60% of which are second homes) but it consumes 10% of the City's daily water supply in the summer (Oswald, 2003). Due to severe drought and an alarmingly low water reservoir level in 2002, both the City and the County imposed water restriction, allowing only once a week outside watering. However, Las Campañas refused to stop watering its golf courses, which generated considerable friction between this community and other town dwellers. A still-common bumper sticker appeared: 'I'll stop watering my lawn when Las Campañas stops watering their golf courses'. The City had to sue Las Campañas in an effort to enforce its restriction, and late in 2003, Las Campañas agreed to reduce their potable water consumption by 45% in exchange for treated City effluent to replace the remaining water needed for their golf courses. This treated effluent, however, used to be returned to the Santa Fe River to maintain its required water flow and for irrigating the land of several agricultural communities located south of the City, who depend on this water to continue their rural life.

Inadequate affordable housing policy and planning

Santa Fe has done little about its considerable affordable housing problem. Although it has been recognized as a public issue since 1982 by Santa Fe City (The Mayor's Task Force on Affordable Housing, 1983), both the City and County have neither systemically assessed it as part of the larger growth condition nor focused upon it as a key policy and planning issue.

The considerable number of wealthy amenity migrants living in the Santa Fe area has significantly increased the cost of living, particularly the price of accommodation (Fig. 5.3). In 2000, 20% of families living within a 50 km radius of the City were affluent compared to 16% nationally (Wright, 2000). These figures, however, probably underestimate the Santa Fe situation, as government accounting does not count many of these people as they are second-home owners with a primary residence registered in another jurisdiction. This general accounting



Fig. 5.3. Economic elite suburb adjacent to a state park and national forest, Santa Fe, New Mexico (photograph: L.A.G. Moss, January 2005).

blindness needs correcting, especially for high-amenity places like Santa Fe (see Müller, Chapter 17 and Moss, Chapter 1, this volume).

In 2002, the cost of living in Santa Fe County was 22% higher than the national average, while wages were 18% below the USA average (Swanson, 2005). Cost of living was above the national average in every category, but significantly higher in housing: 44% more for home ownership and 17% more for rental accommodation (Huddy, 2004). According to a 2001 survey of the Santa Fe rental market, 33% of Santa Fe renters could not afford to pay for a one-bedroom apartment, and 40% and 54% could not afford to rent a two-bedroom and three-bedroom apartment respectively (Reynis, 2004).

While both the City and the County have weak affordable housing programmes, the City is considerably more active than the County in addressing this issue. Since 1996, the City of Santa Fe has built an average of 88 ‘affordable’ houses and 75 apartments yearly (City of Santa Fe Land Use Planning Department, 2005). The County started its homeownership programme in 1996 and sold its first house in 2001, and soon after built and sold 20 new homes. In April 2005, the County will sell 20 homes built in the late

1970s, for US\$77,000 to US\$95,000 (33% less than the average price of a house in Santa Fe in 2005) (Grimm, 2005).

These efforts are inadequate, and unfortunately the gap grew wider recently as incomes stagnated and housing costs soared (Reynis, 2004). Recognizing this, in 2003 the City passed an ordinance mandating a phased-in ‘living wage’ for all workers in private companies with 25 or more employees. This minimum hourly wage in 2004 was US\$8.50, to be raised to US\$9.50 (plus inflation) in 2006, then up to US\$10.50 (plus inflation) in 2008. However, since the passing of this ordinance, part of the business community involved the City in an expensive legal battle. Although the City won, in 2005, members of the New Mexico House of Representatives introduced a Living Wage Pre-emption Bill (H.B. 614), which would block the further implementation of the living wage bill and restrict other state jurisdictions from following suit (Swanson, 2005).

This situation is especially difficult for the low-income residents, both local and newcomers. Low-wage workers in Santa Fe, 36.2% of the total employed in 2002, are concentrated in jobs that are quite seasonal and do not need highly specialized skills or college education, such as accommodation

and food service. These two groups made up the lowest wage sector, 13% of the total employed in 2002, and had an average yearly salary of US\$13,920. The other low-wage sectors, which made up 23.2%, in order of significance were: retail; personal and laundry services; administrative and waste services; arts, entertainment and recreation; and agriculture, forestry, fishing and hunting. They earned from US\$20,688 to US\$23,088 a year (Reynis, 2004). If we use the per annum 'bare bones budget' of US\$37,376 for a two-parent two-child household living in Santa Fe set by the New Mexico Voices for Children in 2003 (cited in Reynis, 2004), those employed in the accommodation and food service sectors would have a considerable shortfall, even with two parents working full time. In this respect, even 'affordable houses', which are available for people who earn 80% or less of the family median income (US\$43,375 for married couples and US\$54,187 for a family of four in 2005) (Grimm, 2005), are unaffordable for many people.

Lack of plan implementation and code enforcement capabilities

Mainly in response to the Traditional Communities' growth problems described above, the Santa Fe County Community Planning Ordinance (CPO) was created in 1996, based on the GP and amended in 2002 to reflect the GMP (Santa Fe County Land Use Department, 2002). It requires TCs approaching critical population size to formulate a community plan (CP). While the CPO has major shortcomings that seriously affect the basic practicality of TC plans (discussed below), it specifically states the necessity to identify growth- and development-related water quantity and quality, long-term water conservation and importation, along with infrastructure needs and solutions to related issues.

However, to date, the approved CPs are, in effect, only partial land use regulation plans and do not deal in particular with the infrastructure needed for community development. One member of the Board of County Commission (BCC) questioned the practical value of these community plans, stating: '...this community planning process isn't going far enough because it just says, okay, these are the restrictions we want, but they

don't deal with the infrastructure we need...' (*BCC Meeting Minutes*, 10 December 2002, p.39). As a result, even after these plans and related ordinances are completed, which on average takes some 5 years, TCs are poorly served by them: population increases (mainly from immigration), while infrastructure remains inadequate, and cultural and environmental quality decreases.

Another example of this paper planning is that although the Code and another ordinance, the Santa Fe Extraterritorial Zoning Ordinance (Santa Fe County Land Use Department, 1997) clearly state that a 'variance' is to be used to protect against hardships related to unique circumstances of a particular property, frequently the BCC and the joint City-County authority for a 3.2-km zone around the City, the Extraterritorial Zoning Authority (EZA), approves variances unrelated to hardship particularities of a property, such as permitting additional buildings, increasing densities or intensities and alleviating personal inconveniences. A former EZA committee member stated, 'variances are given mostly from sympathy, not corruption, but there are no cumulative records of these lot splits' (Van Peski, 2001: 20).

The unfortunate result is that County Plans, the Code and related ordinances have created much smaller lots, through variances applications, family transfer and TC zoning, than was originally proposed in the County's 1975 hydrological study. In effect, the groundwater supply, which was supposed to last for 100 years, will only last for 40 to 50 years. So these areas will run out of water in a decade or two, assuming the 1975 hydrological study was correct.

In an attempt to ensure that the groundwater will last for at least 40 years, until other sources are identified, the County Hydrologist imposes restrictions on all lots created through this process by well metering, regulating water consumption not to exceed 308 m³/year/dwelling and submission of annual well meter readings. However, again this is illusionary, as the County has no staff to enforce these controls, or to create a database to monitor groundwater withdrawals (Thaw Charitable Trust, 1995; The Associated Press, 2003).

To a significant degree such mistakes are the result of inadequate, inappropriate and poorly skilled public planning and management staff.

This is a difficult issue as a higher level of these human resources was probably not needed before the complexities of contemporary in-migration to Santa Fe. Change was marginal and rarely swift. Those in control generally do not perceive the need for more and higher-skilled professionals, and due to this and traditional public expenditure parsimony, have not obtained the needed staff. Cost is an issue, for as in many professions, typically the higher the skill the greater the remuneration. However, places like Santa Fe attract qualified people willing to trade-off material comfort to live in high-amenity places and are often willing to work for less income (Stewart, 2002; Moss, Chapter 21, this volume).

While innovative compensation tactics can help, a not uncommon related problem also exists. Frequently those in control are fearful of being embarrassed by higher-skilled newcomers, or they protect scarce jobs, therefore the necessary, more qualified people are not hired. In addition, commonly, local people do not want the likely change outsiders bring with them. There are also 'outsiders' in some key positions who can affect change, but they came earlier, learned and play the status quo maintenance game, and fence out newer 'outsiders' who have the needed superior skills and awareness of the global condition. They are perceived as a threat to be avoided. At the very least, the County must conduct a serious internal analysis or 'performance-based budgeting that allocates both dollars and staffing to achieve specific objectives based on program goals' (New Mexico Horizons Task Force, 1994: 29).

Manna from heaven?

Santa Fe's public officials commonly expect and accept that water will come from an unspecified source in the future to support the area's continued growth. As noted earlier, the County Code assumes that groundwater resources will be exhausted in 100 years (50 years for lots created through 'family transfer' and 40 years for areas closer to the City), and so the County will need to rely on imported water. The City and County assume this will be done, and the new Regional Planning Authority's Growth Management Plan (2004) also uses this assumption to accommodate

growth. However, although possibilities for importing water exist, funding and political and technological conditions for acquiring it have grown increasingly complex, difficult and expensive (Thaw Charitable Trust, 1995; Ashley and Smith, 2001; Bokum, 2001; Soussan, 2003).

In 2004–2005 after long negotiations among City, County, State, Federal government and Pueblo Indian officials, the US government decided not to fund two regional water development projects: the Buckman Direct Diversion Project (estimated cost: US\$120M), and the more controversial Aamodt Settlement (estimated cost: US\$270M). In the meantime, both City and County have tried to pass much of their water problems on to the land developers, by requiring them to acquire their own water rights for proposed developments. Public officials believe this mechanism will tie population growth to water availability. However, this will likely hasten the pace of growth because the public officials have effectively removed much of this critical issue from both the public arena and their own responsibility. Now developers can acquire water rights more quietly and with much less scrutiny by the public and the media. For example, they could sidestep the public concern they are presently experiencing through the City's attempt to purchase 8.9 million m³ of groundwater rights from the Estancia Basin, a predominantly farming community 104 km south of Santa Fe (Brennan, 2005; Huddy, 2005; Soussan, 2005).

Apparent in much of the above issues is also the lack of adequate and necessary collaboration between the City and the County. On most key issues, such as water, land conversion and transportation, there is contention and competition between these two local governments, so that even obviously needed metropolitan regional policy and action is difficult to approach and more difficult to achieve. It would seem that they wish to 'ignore' the realities of metropolitan growth.

Inappropriate planning perspective and methodology

As argued by a number of scientists principally concerned with contemporary and future societal impacts on the environment and culture (Harman, 1982; Capra, 1983, 1996; Wilber,

1983; New Mexico Horizons Task Force, 1994; Ringland, 1998, 2002; Moss *et al.*, 1999), the world is neither as orderly nor as subject to control and manipulation as had been assumed or hoped. Rather, it is composed of a highly interactive and relative set of variables, rapidly changing and subject to a high degree of uncertainty and unpredictability. Because of this, planners and decision makers 'have searched for better tools and methods for peering into the seemingly impenetrable fog of the future' (Ringland, 1998: ix).

The use of multiple-scenarios strategic planning, in bioregional context, is advanced here (see also Glorioso, Chapter 20, this volume) and by other planners (Jauho, 1994; New Mexico Horizons Task Force, 1994; Ringland, 1998, 2002; Moss *et al.*, 1999; Ewert *et al.*, 2005; Moss, Chapter 21, this volume) as an appropriate method to address this general difficulty, and the Santa Fe area's in particular. This approach and method can manage complex, highly uncertain and rapidly changing conditions: ones more successfully treated in a holistic manner, based on pattern recognition. Naveh and Liebermann (1994) in their book *Landscape Ecology, Theory and Application*, the first English language monograph on the trans-disciplinary science of landscape ecology, stress the importance of pattern recognition in the assessment and management of landscape-based land use and rural planning.

Strategic planning accomplishes this, especially through the formulation of alternative future scenarios based on identifying key decision factors and bringing them together into societal driving forces through pattern recognition. In addition, this method incorporates an ecosystemic long view, puts emphasis on local stakeholder collaboration, and is cost effective.

Like a number of other local planning entities in the USA, plans, analyses and operations of the City and County of Santa Fe contain elements of, or references to strategic planning. 'Strategic planning tool', 'strategic elements', 'vision', 'preferred scenario', 'SWOT' (strengths, weaknesses, opportunities, threats), etc. are used, implying that plans and activities using such terms are in fact strategic plans or strategic planning. Having one or several such elements or references in a plan or in the act of planning is not undertaking strategic planning. The condition is not comparable to picking this and that from shelves in the supermarket. The whole strategic planning method, or at least its key elements, must be used correctly to be successful (see Fig. 5.4). The City's recent economic development strategy exercise (AngelouEconomics, 2004) is a step in the right direction; however, it still exemplifies the strategic planning issues outlined here. Most significantly, multiple future scenarios, or another technique for assessing future uncertainty, was not used, a mission was not formulated, the external analysis is too limited in scope and

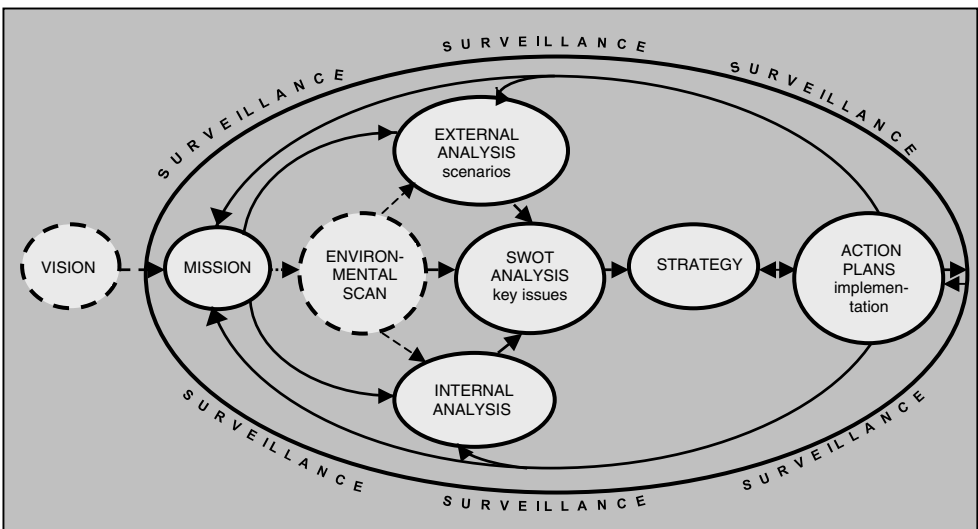


Fig. 5.4. Multiple Scenarios Strategic Planning Process (MP). Source: R.S. Glorioso and L.A.G. Moss (1994).

external and internal factors are confused, critically flawing the SWOT analysis. The result, unfortunately, is not strategic. This approach has probably accounted for much of the failure of so-called strategic planning in local public planning.

Below, I use the Santa Fe County’s Community Planning Ordinance (Santa Fe County Land Use Department, 2002) to give further insight into this and related problems with the County’s planning methodology that are relevant to the issues and opportunities of amenity migration. I chose this process because TCs are in dire need of planning for their growth and development, particularly from amenity migration, and the County has passed on to them the responsibility for this planning, including providing the necessary infrastructure (see further discussion below). It is also important because traditional communities in the County generally think planning is their passport to combating detrimental growth while maintaining their rural quality of life.

Figure 5.5 shows the County-prescribed elements of a community plan (CP), and below I have outlined its main flaws, paralleled by the attributes of the recommended Multiple

Scenarios Strategic Planning Process (SP), illustrated in Fig. 5.4.

1. There is no requirement for a clearly stated objective of the planning task in the CP. Having one is critical in any kind of planning and is of primary importance in SP, where it is called the ‘mission’ (Fig. 5.4). Especially because there are many key stakeholders with diverse interests in public-sector planning, formulating a well-defined and agreed-upon mission plays a major role in bringing interests together and then in guiding the available resources in a single, focused direction – achieving the mission.

2. Because there is no mission or objective statement in the CP, all the analyses and assessments (Fig. 5.5: a. through f.) are anchored to its vision statement. But the vision is neither sufficient nor strategic, ‘as chaos is lost and catastrophes are forbidden’ (Jauho, 1994: 39) in visioning: two dominant features of life that must be considered in planning. Consequently, undesirable factors and critical issues disappear or are masked by unrealistic expectations of the future. I suggest this technique is especially popular among many decision-makers and public plan-

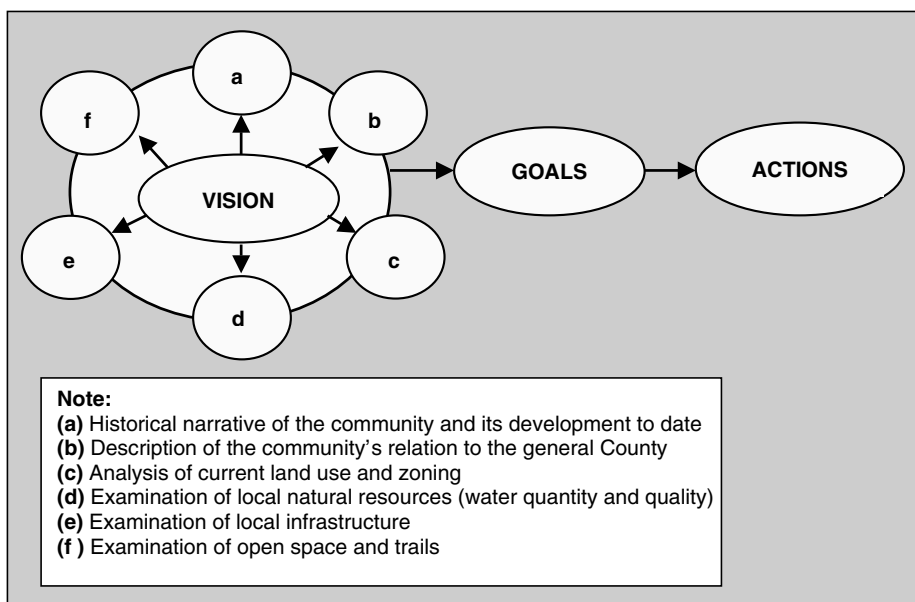


Fig. 5.5. The Santa Fe County Community Planning Process (CP). Source: Santa Fe County Land Use Department (2002) Santa Fe County Community Planning Ordinance No. 2002–3, Santa Fe County, New Mexico, pp. 7–9. Graphical representation by R.S. Glorioso (2005).

ners, including Santa Fe's, because it is simple to understand, least political and does not create controversy for them. SP sometimes uses visioning as an initial exercise before mission formulation, usually to encourage diverse stakeholders to come together around a positive, but purposefully vague image of their community's future (Fig. 5.4).

3. In CP, all the information gathered (Fig. 5.5: a. through f.) is about the community *per se*, which is roughly equivalent to the internal analysis in SP, the strengths and weaknesses that the entity being planned must account for to achieve its mission. Again, this CP approach is neither adequate nor strategic, because, in the main, a community has control over the internal factors and therefore its issues are both more easily understood and solved. Principal issues, and the more difficult, usually lie outside the planned-for community, the external factors in the community's strategic environment. They are the systemically interrelated socio-cultural, economic, political, technological and environmental factors, over which a community has limited or no control, but which greatly affect its ability to reach its mission.

In SP, this is the external analysis, which, depending on the mission, may have a number of nested levels of analysis, such as regional, national and global. Many public-sector professionals, including recent Santa Fe County planners, do not understand either the significance of this analysis or how to use it. In my experience, for example, the County planners did not understand, or perhaps could not accept, that the County is an external key stakeholder from the perspective of a specific community formulating its strategic plan. This creates a dilemma for County officials, for on the one hand they view this condition as a potential threat to their control over the community, but on the other hand they see a local community's planning autonomy as a means of distancing the County from a responsibility for the community's development needs, such as services and infrastructure.

As one Santa Fe County Commissioner stated in a public hearing on a TC's petition to undertake a plan: 'I would ask that the community and the group (petitioners) seriously talk about infrastructure, what their needs are as far as water lines, wells, wastewater systems. And an idea of how they want to pay for them. These are expensive and I think these communities should

start looking at how are we going to pay for these infrastructures' (*BCC Meeting Minutes*, 10 December 2002, p. 39). Also, in my experience, the local community members usually understand the analytical and practical advantages of viewing the County as an external key stakeholder. But while they do not want to be controlled by the County, they also expect their County to be responsible for helping them realize their plan.

4. Almost all aspects of the CP are physical, and myopically focused on land use. Therefore, the resulting community plans are only guidelines for land use, not real community plans for dealing with the usual systemic growth and development key opportunities and issues: socio-cultural, economic, political, environmental, as well as land use; all aspects of the amenity migration they are experiencing. Therefore, to limit a community's plan to land use is not going to solve most of the problems of that community.

5. In CP after the analyses are completed, goals are then formulated and from there 'actions' are developed to achieve the goals (Fig. 5.5). This may be acceptable if the goals formulated are quite specific to issues identified in the analysis. However, based on a comparison of completed County's CPs they are not. Different communities were found to have very similar goals, principally because the vision statements were the same and so the analysis was quite similar. Therefore, resulting 'actions', such as land use regulations, were the same for different communities. This would not happen with the SP methodology, because each mission or objective is very specific to the issues a community is facing. Also, the mission is decided upon first, then key factors influencing their achievement are identified (the external and internal analyses) and are only brought together in a SWOT analysis after this step. From this analysis, key issues for mission achievement are identified. A strategy is then crafted to solve these, and in accord with it, an action plan is formulated, followed by its implementation (Fig. 5.4). A comparatively very logical progression.

6. Although the CP ordinance states a requirement for monitoring and evaluating the implementation of a community plan, the County methodology does not actually include these crucial activities. This is another advantage of SP, because it has an integrated surveillance system,

basic to using the methodology (see Fig. 5.4). This component alerts analysts and decision makers to signs of change and new conditions, and if used correctly, does so sufficiently early and accurately so that the community has lead time to alter strategy and its implementation, which considerably increases success.

Conclusion

The citizens of the Santa Fe area, and other high-amenity places, need to mobilize with more determination than they have to date to seriously protect their amenity attributes. This in turn demands a focus on firm population growth control in the context of ecologically sustainable development (see Moss, Chapter 21, this volume). For this, they will need higher-skilled planners and managers and progressive and well-informed decision makers, especially those who are willing to follow a more difficult path. These changes are especially needed for communities in mountain ecosystems like Santa Fe. Without them the continuing degradation or

demise of natural and cultural amenities and characteristic lowland urbanization is most probable, as a number of analyses suggest is the likely future (Aspen Institute, 1996; Esparza and Carruthers, 2000; Jobs, 2000; Moss, Chapter 21, this volume).

In this future, amenity migrants will probably cease coming or relocate to other mountain Shangri-La's, quite likely in comparatively unexploited developing countries. Or, on the other hand, later generations may settle for lower and lower amenity quality. In this sense, Butler's (1980) tourism life cycle model foretold the amenity migration tale 25 years ago, with the end state being 'decline, stagnate or rejuvenate'. The former two outcomes are those that J.B. Jackson was probably referring to with Santa Fe's '*Spiralling down to just another honky-tonk cowboy town*'.

Will those who want a better ending to the Santa Fe amenity migration story find the will and the means to sustain their mountain bioregion? It will demand considerable change in values, norms and behaviour, and while we see some demonstration of this occurring in Santa Fe, the dream is fading fast.

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6 'Too Much Love?': the Environmental and Community Impacts of Amenity Migrants on Jackson Hole, Wyoming

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Jackson Hole, Wyoming (latitude 43.48, longitude 110.76167) is one of the world's most spectacular places. Surrounded by mountain ranges on all sides, dominated by amazing vistas provided by millions of acres of protected lands, sparsely populated by a mere 18,000 full-time residents, situated 2 h from the nearest interstate highway, and home to an abundance of wildlife large and small, fierce and docile, Jackson Hole has drawn people from afar to experience its natural wonders since the early 1800s.

Initially people tried to live off the land. Then came the wave of visitors, who came to spend a short time in paradise before returning to their homes elsewhere. Increasingly, people who have enjoyed the Jackson Hole experience are returning to make it their home. They are drawn by its natural wonders and its sophisticated cultural offerings. Jackson Hole has benefited in many ways from these amenity migrants. At the same time, however, they threaten the very qualities that drew them to Jackson Hole in the first place. This chapter will present Jackson Hole's history, its amenities, profile, the amenity migrants who live there, and review some of their positive and negative impacts.

Jackson Hole's History

In the early 1800s, fur trappers discovered a Wyoming valley, previously only inhabited by native peoples. One of those trappers, David E. 'Davey' Jackson of the Rocky Mountain Fur Company, left his legacy in the form of a name for the spectacular place – Jackson Hole. As hearty men and women furthered their exploration of the West, the Homestead Act of 1862 gave them the incentive to put down roots. The early settlers to Jackson Hole raised beef cattle, which were fed hay and 90-day oats. Humans subsisted on wild game and produce grown in gardens during a limited growing season.

Tourists probably first arrived in Jackson Hole in the late 1800s. They were guided on hunting and fishing trips by settlers attempting to supplement their meagre ranching income. It soon became apparent to some of these ranchers that there was more money to be made in the tourism business than in the hand-to-mouth existence offered by cattle ranching, and dude ranches began to thrive in Jackson Hole in the early 1900s.

A notable tourist by the name of John D. Rockefeller, Jr first visited Jackson Hole in 1924. His actions thereafter had a dramatic impact,

which endures to the present day. Grand Teton National Park was created in 1929 with only 38,851 ha, encompassing the Teton mountain range and six glacial lakes at the base of the mountains. Lands immediately adjacent to the park were developed in a fashion inconsistent with the neighbouring beauty. Concerned about this negative impact, Rockefeller in the mid-1920s began purchasing the first land of what would eventually total 14,165 ha, with the intention of donating it to the National Park Service. This action was extremely controversial, but it gave President Franklin Delano Roosevelt the impetus in 1943 to designate the 89,440 ha Jackson Hole National Monument next to Grand Teton National Park. These two areas were merged in 1950 as the 125,460 ha Grand Teton National Park we know today.

The next person to dramatically affect Jackson Hole's future was Paul McCollister, who officially opened the doors of the Jackson Hole Ski Corporation in 1967. Coincidentally, or perhaps not, Jackson Hole's permanent population began to dramatically increase at about the same time. Since then, Jackson Hole's history has been marked by growth, change and a dramatic increase in the cost of living.

Jackson Hole's Amenities

In a study of natural amenities and population growth in the Greater Yellowstone Ecosystem (GYE), in which Jackson Hole is located, Rasker and Hansen review a variety of data linking specific amenities to migration. They conclude, '(t)hese findings suggest that population growth in the GYE is associated with mountainous areas with extensive forests, high precipitation and high access to nature reserves' (Rasker and Hansen, 2000:37). Jackson Hole has all of these in abundance. It is easy to understand the phenomenon of amenity migration to Jackson Hole after reviewing its numerous attractions.

Topping the amenities list are two of the crown jewels of the National Park System. Yellowstone National Park, the world's first national park, lies some 96 km to the north of the town of Jackson. People who live in Jackson visit Yellowstone to view its abundant wildlife, including bison, wolves and grizzly and black bears,

backpack in its pristine wilderness, fish in its unspoiled waterways and explore its spectacular geothermal features. In winter, Jackson Hole's residents explore Yellowstone's wonders on snowmobiles and cross-country skis.

Grand Teton National Park lies immediately to the south of Yellowstone and only 6.4 km north of the town of Jackson. The peak from which the park derives its name, the Grand Teton, rises to a height of 4198 m, more than 2286 m higher than the Town of Jackson at 1900 m in elevation. This park is a veritable playground for those who make Jackson Hole their home. Favourite Grand Teton activities include hiking, backpacking, boating, climbing, fishing and wildlife watching in summer and walking, snowshoeing, backcountry and cross-country skiing and snowmobiling in winter. For 4 to 6 weeks in the spring and fall, the road inside the park is closed to motor vehicle traffic and hundreds of Jackson Hole residents swarm to the park on sunny days to bicycle, stroll, run and in-line skate. In October, people make the pilgrimage from Jackson to the park for the annual rite of fall known as the rut. Watching and listening to the mating ritual of the elk is a mesmerizing experience.

The other public lands in Jackson Hole are also a tremendous draw. Ninety-seven percent of lands in Jackson Hole are publicly owned. The National Elk Refuge, which borders the 11,332 m² incorporated town of Jackson immediately to the north, provides key habitat to more than 7500 wintering elk, which receive supplemental feed in compensation for human occupation of their historic winter range. An additional 47 species of mammals and nearly 175 species of birds also make the refuge home. Its 10,000 ha also protect some of Jackson Hole's most spectacular vistas. Access to the refuge is limited, but it nevertheless is a strong attraction for Jacksonites. In 1999, a female mountain lion took up residence with her three cubs in a cave visible from the dirt road through the refuge. Scores of people made the late-afternoon trip daily over the course of several weeks to watch the compelling family at play.

The Bridger-Teton National Forest (BTNF) is also a significant presence in Jackson Hole. Its 1.38 million ha, 486,000 ha of designated wilderness, 48,000 km of roads and trails and thou-

sands of kilometres of rivers and streams occupy a great part of Jackson Hole and beyond. The boundaries of the BTNF touch upon some of the most densely populated areas in Jackson Hole. You will find any number of Jacksonites running, walking their dogs, riding horseback or mountain biking on the trails of the forest during their lunch hour and after work. On winter weekends, the parking lot on top of Teton Pass is filled with the cars of backcountry skiers and snowboarders seeking a less-travelled alternative to the ski area experience. At a greater distance from the population centres of Jackson Hole, motorized uses are more prominent in the BTNF. These include all-terrain vehicles, dirt bikes, helicopter skiing and snowmobiles.

Although technically not in Jackson Hole, the Targhee National Forest is heavily used by Jackson Hole's residents. Its eastern boundary follows the ridge of the Teton and Snake River mountain ranges on the western border of Jackson Hole. It also includes the Jedediah Smith Wilderness. The experiences to be found in the Targhee National Forest are very similar to those found in the BTNF.

The Snake River winds through both Grand Teton National Park and the Bridger-Teton National Forest, but it deserves a discussion all its own. Starting in late spring and continuing through mid-fall, Jackson Hole's residents join thousands of visitors in their exploration of this glorious waterway. In 2002, private boaters spent 52,000 days on the Snake River and 89,000 individuals took a commercial river trip (Charture Institute, 2003b). The Snake is explored by raft, kayak and canoe on both flat water and rapids. Its fisheries draw people from all over the world, who seek to catch a cutthroat trout or two or more. The Snake also attracts people to view the wildlife that thrives along its course. At dawn and dusk, moose may be found grazing in the willows at river's edge, while bald eagles search for fish from their perches on high. Commercial rafting and fishing use of the Snake is limited by permit. Private use numbers are not regulated.

With such an abundance of activities occurring on the lands comprising Jackson Hole, it is only natural that entrepreneurs capitalized on the opportunities to provide residents and visitors alike with more formal recreational opportuni-

ties. There are four official resorts in Jackson Hole, so designated by the land development regulations of Teton County, the political jurisdiction that encompasses more than 10,000 ha² comprising Jackson Hole. Their primary focus is golf and skiing. As one might expect, the resorts were formed in large part to draw tourists to Jackson Hole. However, they also play a major role in attracting full-time residents to the valley.

Snow King Resort is the oldest of the official resorts in Jackson Hole. Founded in 1939, Snow King is the oldest ski area in Wyoming and is known as the Town Hill. Snow King is the only resort located within the town of Jackson. The mountain after which the resort is named rises to an elevation of 2380 m and provides year-round recreation for hikers, mountain bikers, skiers and horseback riders. Part of the resort area is operated under permit from the Bridger-Teton National Forest. Its attractions are easily accessed by foot, public bus or car, and are used through all daylight hours with locals seeking to catch a quick outing. The resort also hosts numerous community events in its conference facilities and includes a hockey rink where local children skate in formal figure skating and hockey programmes and where the Jackson Hole Moose semi-pro hockey team entertains fans regularly throughout the winter.

The Jackson Hole Mountain Resort is the area's most famous resort. Its 1012 ha of challenging and beautiful terrain inspired Paul McCollister in 1967 to invite the public to play with him. The opening of the resort is generally attributed with transforming Jackson Hole from a great place to visit in the summer to a year-round destination for tourists and a viable place for people drawn by Jackson Hole's amenities to put down roots and make a living. Until recent years, the primary focus of activity at the resort has been skiing. An average snowfall of almost 762 cm between December and March annually, combined with challenging terrain, puts Jackson Hole at or near the top of many North American skiers' list of favourites. In changing its name several years ago from the Jackson Hole Ski Corporation to the Jackson Hole Mountain Resort, the resort indicated its shift to year-round activity. Although in large part the shift was designed to attract visitors in the resorts slower summer months, the construction of mountain

biking trails, availability of transport to and from the top of the 3185 m mountain via aerial tram and summer activities draw many locals too. High-end residential construction continues to thrive at the base of the mountain and future plans call for more, as well as the development of a golf course.

Grand Targhee Resort is not technically within Jackson Hole, nor is it technically yet a resort district under Teton County's land development regulations, but it is undoubtedly an additional winter playground for Jackson Hole's residents and visitors. With the slogan 'Snow from heaven, not from hoses' prompted by an average of more than 1270 cm of dry powder each year, relatively gentle terrain and a visitation of approximately one-third of the Jackson Hole Mountain Resort, many who live in Jackson Hole find Grand Targhee provides a quiet alternative to the bigger ski resort action within the valley.

The grand vistas of Jackson Hole provide a perfect backdrop for those who enjoy recreating in environments not provided by nature, that is to say golf courses. Two of Jackson Hole's resort districts host golf courses. The Jackson Hole Golf and Tennis Club, owned by Vail Resorts, and the Snake River Canyon Ranch offer high-end homeownership, golf and other summer activities for those who wish to enjoy what Jackson Hole has to provide and more. The Teton Pines development, home to Vice President Dick Cheney, offers a similar model, though it is not an official resort. An additional golf course and residential development is expected to be completed in 2005 and yet another is proposed for construction at the base of the Jackson Hole Mountain Resort.

Jackson Hole's natural environment, and the many activities it supports, is undoubtedly the main draw for amenity migrants. Over time, however, a rich cultural environment has developed to support those drawn to the area for other reasons. This second environment is playing an increasingly large role in attracting people to Jackson Hole. The two most prominent cultural amenities in Jackson Hole are the Grand Teton Music Festival and the National Museum of Wildlife Art.

The Grand Teton Music Festival was founded in 1962 and moved into its present home, the 750-seat Walk Festival Hall at the base

of the Jackson Hole Mountain Resort in Teton Village, in 1974. Today, the Music Festival's primary claim to fame is its resident orchestra comprised of musicians from America's great orchestras and music schools. It presents approximately 40 summer orchestral, chamber and children's concerts, primarily in the months of July and August. The Musical Festival also stages one of Jackson Hole's most popular community events, the annual Music in the Hole 4th of July concert, which attracts more than 10,000 people for great music and camaraderie in the shadow of the Tetons.

The National Museum of Wildlife Art is a 4738 m² facility overlooking the National Elk Refuge, north of Jackson. Its collection includes 2300 works of art selected for their ability to inspire public appreciation of fine art and humanity's relationship with nature. The museum originally opened in downtown Jackson in 1987. The doors to its present home opened in 1994. It hosts 90,000 annual visitors.

Among Jackson Hole's other notable cultural attractions is the Main Stage Theatre, which is operated by a non-profit organization and hosts a steady stream of musical, dramatic and comedy performances throughout the year. The Banff Festival of Mountain Films showcases a variety of mountain cultural and athletic activities in its multi-night annual visit to Jackson Hole each February. The Art Association's annual Mountain Artists' Rendezvous, held twice each summer in downtown Jackson, features the art of regional artists in a variety of mediums for locals and visitors to enjoy and purchase.

The fundraising events of the more than 150 non-profits, such as the Jackson Hole Conservation Alliance's Silent Art Auction, the Jackson Hole Ski Club's Black Tie and Blue Jeans Ball and the Grand Teton Music Festival's Wine Auction provide a never-ending list of entertainment possibilities. Lectures on the subjects of health, athletic accomplishment, education and wildlife pepper the local paper's weekly calendar. Finally, a new Centre for the Arts is presently under construction in downtown Jackson. The state-of-the-art, multi-million-dollar facility will include several performance spaces, classrooms and offices for local arts organizations. It is sure to give a boost to Jackson's already thriving arts community. Jackson Hole's

attractions are rounded out by numerous shopping and dining opportunities, including restaurants that are regularly featured in travel and cooking magazines with large national circulations as well as newspapers such as the *New York Times* and *Los Angeles Times*.

As attractive as all of these amenities are, many of Jackson Hole's amenity migrants need to maintain regular contact with the outside world, whether it be for business or for pleasure. This access is facilitated by the Jackson Hole Airport, located a short 16 km north of Jackson. Providing year-round commercial jet service and extensive facilities for private aircraft, the airport is a key amenity for Jackson Hole's residents. The airport receives greater attention below.

Jackson Hole's Amenity Migrants

People who migrate to Jackson Hole for its amenities generally fall into two groups. The first group includes young people who arrive straight out of college to enjoy the recreational activities of Jackson Hole, in both summer and winter and work to support their lifestyle in a service industry job. Initially, they typically rent their housing, and have little involvement in the larger community. This younger category may or may not make the decision to stay long term. If they do, they buy houses on the lower end of the housing price range, send their children to the local schools and often start their own businesses.

The second group of amenity migrants may generally be identified as being near or at retirement age, wealthy, often maintaining a residence elsewhere, actively involved in local organizations and enjoying both outdoor recreational and cultural activities. The differences between these two groups pose challenges that will be discussed below.

Amenity migrants contribute substantially to two of Jackson Hole's most significant statistical trends. In 2002, Teton County, Wyoming was the wealthiest county in the USA, reporting US\$991.9 million in total income, with a mean per-tax return adjusted gross income of US\$107,694. Teton County has ranked first or second in the nation in personal income every year since 1997 (Thuermer and Schechter, 2004). Teton County is also growing very quickly.

Between the years 1970 and 2000, Teton County's population grew by 275% as compared to 50% growth for the state of Wyoming and 30% for the nation at large (Charture Institute, 2003b). In the 1990s alone, Teton County grew 63%, for an average population increase of 6.3% per year. This growth rate placed Teton County in the top 1.5% of all American counties (Charture Institute, 2003b).

Some additional statistics help provide a picture of the influence of amenity migrants on Jackson Hole. Compared to the populations of the USA as a whole and the state of Wyoming, Teton County has fewer very young people and fewer very old people. As a result, the proportion of people between ages 25 and 54 is significantly larger than in those other areas (Charture Institute, 2003b). In the 1990s, the greatest influx of people to Teton County was in the 25–34 age group, and resulted in a disproportionately lower median age in Teton County than in Wyoming and the USA, when the year 2000 is compared to 1990.

Teton County's population is also very well educated, thanks to its amenity migrants. In 2000, 45.8% of adult residents were college graduates and 13.7% had professional or graduate degrees. These amounts were 53 and 57% respectively, greater than in 1990. This level of education is reflected in the fact that 49.1% of the populace is employed in the professional services sector of the economy (Sonoran Institute, 2003).

Teton County also has a significantly lower proportion of owner-occupied housing units (54.8% in 2000) than the state of Wyoming (70%) or the USA as a whole (66.2%). This number in large part reflects the housing use of the younger amenity migrants in Jackson Hole. They primarily rent their housing. Another statistic illustrates the effect of the older category of amenity migrants on Jackson Hole's housing use. The percentage of occupied (versus vacant) housing units in Teton County (74.9% in 2000) is also notably lower than in the state of Wyoming (86.5%) or the USA as a whole (Sonoran Institute, 2003). A substantial portion of these vacant homes are the second homes of amenity migrants who maintain other residence(s) elsewhere. The increase in the number of vacant homes relative to occupied homes between 1970 and 1990

reflects Jackson Hole's increasing appeal to amenity migrants during this time period. Interestingly, a decrease in vacant homes in the 1990s seems to indicate that homes once left vacant a good portion of the year are increasingly being used as primary residences (Charture Institute, 2003b).

Employment and income statistics also show the impact of amenity migrants on Jackson Hole. Employment in the service, professional and construction fields increased as a proportion of total employment between 1970 and 1990, while employment in agriculture, mining, manufacturing and government decreased (Sonoran Institute, 2003). In the year 2000, non-labour income such as dividends, interest, rent and transfer payments represented 46.5% of income type in Teton County, a 50% increase from 1970 (Sonoran Institute, 2003). In the 1990s alone, Teton County's mean adjusted gross income grew at a rate approximately five times that of Wyoming and the USA (Charture Institute, 2003b).

The buying power of the wealthy amenity migrants is reflected in Teton County's housing prices. The median price of a home in Teton County in 2000 was US\$365,400 as compared to US\$96,600 in the state of Wyoming and US\$119,600 for the USA as a whole. The most dramatic increase occurred in the 1990s, when the median home price almost tripled, resulting in a growth greater than five times that in the rest of the country. The volume of sales has also increased. The total number of residential home sales increased by approximately 20% from 1992 to 2000. During this same period, the total dollar volume of residential home sales increased by more than 400%, reaching a high of almost US\$550 million in 2000. The estimated value of new residential construction in that year was almost US\$194 million (Charture Institute, 2003b).

The statistics show that amenity migrants appear to be increasingly important to Jackson Hole's economy. As Teton County's population grew significantly in the 1990s, so did its taxable sales, from US\$379 million in 1991 to US\$782 million in 2000. Yet during this same time period, some of the main tourist indicators have shown little growth. Total annual recreation visitations to Grand Teton National Park were 2.6 million in both 1991 and 2000. As a result of an

ambitious improvement programme at the Jackson Hole Mountain Resort in the mid-1990s, total annual skier days are up from the early 1990s, but have been flat since 1998 at about 355,000 (Charture Institute, 2003b).

The Impacts of Jackson Hole's Amenity Migrants

As amenity migration receives increased attention here in the USA and worldwide, its impacts are starting to be studied in a more carefully considered manner. Hansen *et al.* discuss the ecological causes and consequences of amenity migration in the West, concluding '(o)ur results suggest that the newcomers attracted to the West by its natural amenities may also be affecting wildlife through their choices about where to live and play' (Hansen *et al.*, 2002: 160). The evidence they reviewed indicates that rural residential development of the type found in the West, including Jackson Hole, 'is altering natural habitats, favouring some wildlife species and reducing the population viability of other wildlife species and increasing the mortality rates of threatened species such as the grizzly bear' (Hansen *et al.*, 2002: 160). This residential development is also prompting new approaches to fire; altering the natural fire regime spreads weeds and facilitates the introduction of wildlife diseases.

In Jackson Hole, individuals knowledgeable about Jackson Hole's environment were surveyed in 2002 regarding their opinions about the health of Jackson Hole's environment in 2002 versus its health in 1990. Those surveyed generally responded that they felt Jackson Hole's environmental health had declined during this period (Charture Institute, 2003a). They expressed particular concern about animal habitats and raptor and amphibian populations. The respondents were also pessimistic about whether Jackson Hole will be able to maintain its environmental health in the face of continued population growth. For example, when asked in what specific ways Jackson Hole's environment was less healthy in 2002 than in 1990, one respondent answered: 'Much more crowded. The conversion of wild or agricultural land to housing, businesses and infrastructure has a detrimental effect on wildlife no way around that.' Another commented in a similar vein: 'More

development spawns the need for more infrastructure, which has more impacts. It is a vicious cycle, and the environment loses at every turn. More is not better, bigger is not better.'

Neither of these studies definitely concludes that population growth is the cause of environmental degradation. The authors acknowledge that this is a topic that requires further study. Yet, the data certainly suggest that this is the case. The following specific examples illustrate that Jackson Hole's amenity migrants indeed play a role in eroding the health of the environment in Jackson Hole.

Land development

Land in Jackson Hole continues to be consumed by development at a brisk pace. It would not be stretching it to say that all land in Jackson Hole has environmental value, because of either scenic or wildlife properties. Yet it is undoubtedly true that some land in Jackson Hole is of greater environmental value than others. It is this value that tends to be the most attractive to those who have almost no limit on the price they can pay for their piece of heaven. Properties at a premium are those near the Snake River, with views of the Teton Range, adjacent to lands protected by the government or by private conservation easement and on which wildlife graze. The bulk of these lands provide critical habitat to deer, elk and moose in Jackson Hole's harsh winter months.

Teton County and its sole incorporated municipality, the Town of Jackson, have made some effort to protect these important lands. In 1994, they jointly adopted a new comprehensive master plan and individually adopted implementing land development regulations (LDRs) that encourage the protection of open space and wildlife habitat. The LDRs include two special zoning district overlays known as the Natural Resources Overlay (NRO) and the Scenic Resources Overlay (SRO). The NRO indicates lands with special wildlife values. The SRO indicates lands with special scenic values. A person who wishes to receive a development permit in the NRO or SRO must complete an environmental assessment, studying the potential impact of the project on wildlife and/or scenic resources. The regulations then require the developer to

minimize the environmental impact of the development on the parts of the property most valuable to wildlife or with greatest scenic value. The NRO and SRO regulations have shown mixed results, as the subsequent examples will show.

In 2000, a developer proposed a 71-home, 146 ha residential and golf course development, known as the Canyon Club, on the banks of the Snake River in the Snake River Canyon south of Jackson. The Snake River Canyon is one of the most heavily used sections of the Snake River by rafting and fishing outfitters and by recreationists and kayakers. It also hosts prime habitat for numerous wildlife species, including moose, cut-throat trout, elk, deer, bears, mountain lions, trumpeter swans, herons and bald eagles, which are protected as a threatened species under the *Endangered Species Act*. The entire Canyon Club property is situated in the NRO.

The Canyon Club posed two primary threats to the environmental resources in the Snake River Canyon. First, the developer proposed to construct several of the houses in relatively close proximity to the Snake River. Development of this type on the northern parts of the Snake River has generated the construction of dykes and levies to protect multi-million-dollar homes, destroying the natural flow of the river. Government authorities are already pursuing a US\$50 million restoration project to mitigate the effects of these actions. People were extremely concerned about further degradation of the river's natural flow (Fig. 6.1).

The development also occurred within a 400 m radius of three bald eagle nests, including the most productive nest in the Greater Yellowstone Ecosystem. The US Fish and Wildlife Service issued a permit allowing the development, but indicating that the construction and operation of the Canyon Club would result in the death, or 'taking' of up to 18 eagles. The Teton Board of County Commissioners approved the development in 2003 with 76 conditions, though the conditions did not address all of the concerns of the environmental community. The project's construction stalled in late 2003/2004 due to bankruptcy.

Investors in Jackson Hole real estate development seem to feel amenity migrants have an insatiable desire to play golf. Two years after the Canyon Club development began its develop-



Fig. 6.1. The town of Jackson Hole, Wyoming, USA and the Snake River, with surrounding urbanizing area (ASTER image, August 2001: courtesy of M. Abrams, US Jet Propulsion Laboratory).

ment review, another golf course/residential development was proposed on a larger scale closer to the town of Jackson. The development is located on 287 ha, formerly used for ranching. The land hosts stunning views of the Tetons and includes three tributaries of the Snake River, thus its name Three Creek Ranch. The land was reportedly purchased for approximately US\$75 million and will include 152 homes and an 18-hole golf course.

There are both similarities and contrasts between the Canyon Club and the Three Creek Ranch developments. Both will host private golf courses making claims to environmental sensitivity and featuring homes that may only be afforded by the nation's wealthiest people. Both include land that is valuable to wildlife. However, the Three Creek developers proved to be more sensitive to environmental concerns. They were fortunate that only a relatively small portion of the land encompassed by their development is in

the NRO. They elected to put no development in the NRO. They are also pursuing habitat improvement projects for cutthroat trout and trumpeter swans. Yet in some way the impacts of their project will be more significant, primarily because its scale is more than twice that of the Canyon Club. The project is prompting an extension of the town's sewer line to serve it and the expansion of the county road that provides access to the property. The berms constructed immediately adjacent to the road have also significantly eroded the scenic views. What was once a sleepy country road with world-class views is now dominated by dump trucks and soon sports utility vehicles (SUVs).

The increase in amenity migrants is rippling over to land development beyond that of merely residential construction. In 2001, the Teton Science School, a non-profit organization providing environmental education, opened Jackson Hole's first private school for local school chil-

dren in grades K to 12, known as the Journeys School. Community interest in the educational experience offered at the Journeys School has been extremely high. The smaller class sizes and focus on the environment is particularly appealing to amenity migrants arriving from sophisticated academic communities on both US coasts.

In 2002, the Journeys School began its search for a new campus that would allow it to expand to serve some 200+ students in its private school as well as support its other programmes for adults and teachers. It settled on a totally undeveloped property designated within the NRO because it contains crucial winter range for both elk and mule deer. The site is over 80 ha, although development of ten buildings totalling approximately 7896 m² will be limited to roughly 6 ha. The building site was selected in order to protect the scenic view shed on the highway frontage. The school's administrators also adopted a wildlife management plan to limit the campus' impact on the wildlife that uses the property.

As a condition of purchase, the Teton Science School granted a road easement through its property, which allows increased access to land atop an adjacent hill with significant scenic and wildlife values. The wildlife values of the property prompted some local opposition, though generally public support was fairly strong given the nature of the Teton Science School's work. Given the geographic constraints of the property, the most likely alternative development for the property was four or five large single-family homes that would stand unoccupied a good portion of the year.

To date, there have been no real constraints to continued land development in Jackson Hole. Several water and sewer districts have kept up with demand for their services. Solid waste is transported to Sublette County, Wyoming to Jackson Hole's south for land filling. These situations could change with increasing demands. Furthermore, the political will evidenced by the planning efforts of the early 1990s has appeared to stall. The governments of Teton County and the Town of Jackson have had difficulty working in concert on managing growth. As a result it must be said that growth generally proceeds in a largely unmanaged fashion, with the local electorate responding

through citizen initiatives to overturn decisions resulting in significant growth. In 2003, long-term discussions began on consolidating the two governments in an effort to address the problems generated by this situation.

Traffic and transportation

Increased traffic is a logical outgrowth of a growing population and new land development. As a result of increased traffic, all of the major highways in Jackson Hole have been or will be reconstructed over the course of approximately 15 years, starting in 1996 and going through 2011 or so. These construction projects also have significant environmental consequences.

Jackson Hole's residents are quick to blame traffic woes, which are most acute in the summer, on tourists, a great many of whom visit in their own motor vehicles. Traffic does in fact peak annually in July, but this is also a month in which amenity migrants who reside in Jackson Hole part time are here in full force. And traffic volumes in the so-called 'shoulder seasons' of spring and fall are still quite substantial. A traffic survey from 1997 to 1998 showed traffic volumes of almost 10,000 vehicles on one of Jackson Hole's primary highways in the least busy month of April. During peak morning commute hours, the April traffic volumes were approximately 65% of the same hours in July (Jackson/Teton County, 2003).

The Wyoming Department of Transportation predicts that traffic will continue to increase dramatically in the next two decades. One model forecasted that unless Teton County works proactively through changing land use and increasing walking, bicycling, transit and ride sharing, traffic will more than double on many key road segments by the year 2020 (Jackson/Teton County, 2003). The typical response of a transportation agency to such predictions is to make plans to increase the capacity of the roadway system. Most of Jackson Hole's highways are only two lanes, allowing one lane of travel in each direction. In 15 years, the two-lane road will be a rarity in Jackson Hole, replaced by three- or five-lane highways allowing high-speed travel and a dedicated centre lane for turning. Local residents and elected officials have generally expressed concerns

about this trend, but have had little luck to date in encouraging state and federal transportation planners to look beyond textbook solutions to dealing with traffic problems.

The consequences of this trend are significant. Wider highways destroy plant communities. They require extensive grading work, which often leaves behind scarred hillsides that mar scenic vistas. They encourage higher speeds, which, coupled with the wider pavement, present a formidable barrier to crossing wildlife. The higher speeds also result in a greater number of wildlife/vehicle collisions. They increase impervious surface, which degrades water quality in adjacent water bodies. Road construction also increases the presence of invasive plant communities. These are just the environmental impacts. The new model of road construction in Wyoming also erodes the rural community character of places like Jackson Hole, depersonalizing them, encouraging strip commercial development and destroying their uniqueness.

In early 2004, the Wyoming Department of Transportation and Federal Highway Administration finalized plans to reconstruct US Highway 26/287, known as the Togwotee Pass highway. This highway is the eastern gateway to Jackson Hole. It crosses the Continental Divide, cresting at 2944 m above sea level. It traverses two national forests, the Shoshone and Bridger-Teton and a small portion of Grand Teton National Park. Motorists travelling west on this highway are treated to staggering views of the Teton Range. The Togwotee Pass highway also cuts through some of the richest wildlife habitat in the USA. Grizzly bears, Canada lynx, grey wolves, wolverines, black bears, elk, deer, moose and numerous other species inhabit the rich lands on either side of the highway.

In the mid 1990s, the Wyoming Department of Transportation (DOT) determined that the Togwotee highway was unsafe to motorists for a variety of reasons. Rather than doing the minimum to fix the safety problems, Wyoming DOT is undertaking a 7–12-year, US\$100 million reconstruction that will increase the capacity of the road and allow people to travel at extremely high speeds. Furthermore, the DOT's own environmental review estimates that the physical work required for expansion of the highway will disturb significant quantities of key wildlife habi-

at, including the following: Canada lynx habitat, 94 ha; grey wolf habitat, 111 ha; grizzly bear habitat, 111 ha; bald eagle habitat, 88 ha; and wolverine habitat, 53 ha (Wyoming DOT and Federal Highway Administration, 2003). Yet, the initial plans also fail to provide any specific measures to preserve wildlife movement in the area, despite strong pressure from the environmental community.

Future reconstruction projects pose similar threats to Jackson Hole's wildlife. One alternative proposed by Wyoming DOT for the reconstruction of US Highway 189/191, south of Jackson, would construct two new bridges over the Hoback River, introducing thousands of cars each day into an area that now has very little human activity and what activity there is on foot. A second project would increase a two-lane highway to four lanes in a location where there are the most wildlife–vehicle collisions in the entire state of Wyoming. Plans to expand the resort at Teton Village are prompting calls for a new bridge across the Snake River to serve a road that would connect the Village and the Jackson Hole airport.

Teton County officials are showing themselves to be somewhat more sensitive to the impact of increasing traffic. In January 2000, they adopted a transportation plan with a goal of reducing drive-alone motor vehicle trips from 55 to 42% of trips by the year 2020 while increasing walking, bicycling and public transit trips from 15% of trips to 28% (Jackson/Teton County, 2003).

Teton County and the Town of Jackson actively support a multi-use pathways programme and a transit system, systems generally enthusiastically supported by amenity migrants who have been exposed to such facilities in the communities from where they came. Since 1996, approximately 32 km of pathways for bicyclists, pedestrians, in-line skaters, equestrians and Nordic skiers have been constructed. The full potential of the system for reducing motor vehicle trips – the County's goal is that 10% of all trips will be by bicycle in the year 2020 – remains to be seen, as several key connections have not yet been completed. Jackson Hole's fierce winter also limits the impact of the pathways. It must be noted as well that the pathways are not without their own environmental concerns. Pathways

planners have striven to make the pathways as aesthetically pleasing and removed from traffic as possible. This has resulted in proposals to construct pathways in sensitive wildlife areas. The community is still struggling to find the proper balance regarding this matter, but it is making progress, as the recent formation of a working group on pathways and wildlife shows.

The public transit system, known as START, originated in the late 1980s, primarily to transport winter visitors between the town of Jackson and the Jackson Hole Mountain Resort at Teton Village. Today, START includes year-round service to Teton Village, as well as commuter service to and from adjacent Lincoln County and a free town shuttle that cycles through town every 15 min. In 2003, START carried 362,000 riders.

Environmentally, the transit system is for the most part benign. In the summer months, the transit vehicles use a bio-diesel blend. They operate on existing infrastructure and reduce the number of motor vehicle trips on area highways. The question is whether the transit system will ever carry enough people to significantly decrease traffic in Jackson Hole and consequently preserve the environment. The younger amenity migrants to Jackson Hole ride the START system in decent numbers, as many of them live and work in areas well served by START. In particular, the Jackson Hole Mountain Resort, which employs more than 1000 people in winter, provides free START passes to its employees. The older, wealthier group probably uses the START system very little. They live on larger parcels more scattered across the landscape in places not served by START, which is also challenged by the great expense of operating a public transit system. In 2001, local voters failed to give electoral support for funding to enable further expansion of START. Public transit is viewed as a crucial element of a sustainable future for Jackson Hole, but actions are slow to follow the words.

Jackson Hole Airport

Rasker and Hansen conclude that population growth in the Greater Yellowstone Ecosystem is 'closely related to the availability of an airport

with daily scheduled commercial airline service.' (Rasker and Hansen, 2000: 39) In Jackson Hole, the airport not only has an indirect effect on the environment through facilitating population growth. Its effects are direct, as the Jackson Hole airport is located within Grand Teton National Park, the only commercial airport in the USA to bear the distinction of being entirely located in a national park.

An unpaved landing strip first appeared on the current site of the airport in the 1930s. Commercial air service began in 1941. Today, the Jackson Hole Airport operates under a special use permit with the National Park Service with 216 ha assigned to airport use. The first such permit was issued in 1955. The Jackson Hole Airport hosts 57% of the state's overall commercial air volume. In 2002, there were 190,416 enplanements and 192,282 deplanements at the Jackson Hole Airport. There were 5366 commercial flights, 7737 private jet flights and 15,850 other private flights (Charture Institute, 2003b).

Local businesses are confident that the local economy is dependent on a large number of commercial airline seats. For years, they have subsidized commercial service to the airport by providing a revenue guarantee to commercial airlines to deliver people to Jackson Hole year-round, with a special emphasis on the winter season. The Jackson Hole Mountain Resort has historically led this effort, but in the early 2000s, several local business people formed Jackson Hole Airservice Improvement Resources (JH AIR). This group has assumed the responsibility for negotiating with the commercial airlines for service to Jackson Hole. For the 2003/04 winter season, JH AIR negotiated with four major airlines to provide 115,000 jet seats with a US\$1.2 million revenue guarantee.

However, tourist visits are flat, as the visitation numbers at Grand Teton National Park and the Jackson Hole Mountain Resort shared above indicate. It is in large part amenity migrants who are motivating growth at the Jackson Hole Airport. In particular, the airport has seen a tremendous growth in its general aviation, that is, private airplane traffic. Between 1997, the first year in which private jet flights were tracked, and 2002, traffic increased 222%. The airport cautions that the installation of a control tower in

2000 increased its ability to track such traffic, but other information supports a conclusion that the increase in this traffic category is dramatic. The airport has recently been assigning landing times to private craft to avoid excessive crowding on peak summer days. Jackson Hole Aviation, which manages the general aviation activities at the airport, is also seeking to expand its facilities at the airport.

Commercial aviation facilities are also being increased at the airport. In 2003, the Jackson Hole Airport Board received a US\$4.68 million grant to expand the airport terminal by approximately 1115 m². The grant funded an expansion of the ticket counters, the passenger holding area, security facilities, an additional baggage carousel, larger restaurant and retail facilities and more parking.

The presence of the airport in the national park prompts intense scrutiny. The bulk of the focus has been on concerns about noise. Pilots are given numerous instructions for take-off and landing, as the bulk of the park lies immediately to the north of the airport and a fairly large number of residences lie to the south. In 2001, the Jackson Hole Conservation Alliance engaged more than 1000 citizens to support its request to ban scenic air tours over the park. Years of attention to the noise issue culminated in April 2004, with the banning of noisy Stage 2 aircraft from the airport.

However, noise is not the only concern. In spring, Jackson residents rise at 5 a.m. to gather at the end of the airport runway to watch the mating ritual of the sage grouse, known as the 'strut'. Each time the airport physically expands, it removes more of the sagebrush that provides the sage grouse with its habitat. Regionally, the loss of sagebrush habitat has prompted calls for the listing of the sage grouse on the endangered species list.

From time to time, there is a rumour that airport officials are considering removing the airport from the park. In reality, it is probably there to stay. The airport may in some fashion be considered the battleground on which the struggle of growth versus the environment will be fought, although it is probably fair to say that the full potential of airport expansion has not yet been realized by those who value Jackson Hole's environment.

Adjacent communities

The influx of amenity migrants to Jackson Hole is not only affecting its immediate environment. Many who are drawn to Jackson Hole's amenities cannot afford to buy a home there. As a result, when they are ready to move from renting a home to owning one, they make the choice to live in an adjacent community where they have access to Jackson Hole's amenities and also to the income-producing opportunities it offers. Most in this position live either in Teton County, Idaho, on the other side of Teton Pass some 32 km west of Jackson Hole, or in Lincoln County, Wyoming, on the other side of the Snake River Canyon some 56 km south of Jackson Hole. In the 1990s, Teton County, Idaho was one of the fastest-growing counties in the nation, growing 74%. The growth in Lincoln County was significantly less, but still notable at 15%. Growth in these communities has the same effect as it does in Jackson Hole. More people are building houses on important open lands, driving their motor vehicles on area roads and recreating in sensitive wildlife areas.

Many of the amenity migrants originally drawn to Jackson Hole who eventually decide to live in Teton County, Idaho and Lincoln County, Wyoming commute to Jackson Hole for work. The roads on which they travel cut through public lands with rich resource values. In 2001, the Wyoming Department of Transportation counted 4105 average daily trips over Teton Pass, an increase of 69% from 1993. Teton Pass traverses both the Targhee and Bridger-Teton National Forests. On its west side, it travels alongside a stream where moose graze on willows. Commuters from Lincoln County, Wyoming drive through the Snake River Canyon, the resources of which are inventoried above. In 2001, the average daily trips on the road connecting the Snake River Canyon to Jackson numbered 5222, an increase of 28% from 1993 (Charture Institute, 2003b). Reconstruction of the highway through the Snake River Canyon is nearing completion after some 6 years. In order to accommodate impatient commuters, Wyoming DOT installed passing lanes through an area where elk move across the road between the Snake River and a nearby elk feed ground.

While there are similarities between Teton County, Wyoming and these two adjacent

communities, there are also important differences. The percentage of people born in state in Teton County, Idaho and Lincoln County, Wyoming is more than twice that in Teton County, Wyoming. As a result, there is a lot less support for land use regulation schemes that will protect the environment. There is no counterpart to the Natural Resources Overlay in Teton County, Idaho or Lincoln County, Wyoming. There is also little incentive to cluster development. The primary mode of development in these communities is low-density, relatively large lot subdivisions. This allows little meaningful protection of open lands for wildlife habitat.

Positive Impacts

In order to present a complete picture of amenity migrants' impacts on Jackson Hole, it is also important to examine the positive change that has resulted from their presence.

Their wealth has contributed to the construction of a state-of-the-art public library, a public recreation centre including an indoor swimming pool, an expanded hospital, a community pathways system and a US\$24 million high school and two new elementary schools, all built in the past 10 years.

The presence of amenity migrants, coupled with the large number of tourists who visit Jackson Hole, has also resulted in the provision of a very high quality of public services for a community of Jackson Hole's size. The two governments in Teton County – the county itself and the incorporated town of Jackson – boast excellent police and fire departments, a large public health staff, an extensive parks and recreation department, a sewage treatment plant with excess capacity and a variety of other public employees who are among the best compensated in the valley.

Amenity migrants also support more than 150 non-profit organizations in Jackson Hole. Some of the larger ones, such as the Grand Teton Music Festival and the National Museum of Wildlife Art, are discussed above. Others include the Teton Literacy Programme, which provides literacy support to the large Latino population in Jackson Hole, as well as adults and children who need literacy support; the Jackson Hole Community Housing Trust, which works to

provide private, affordable-ownership housing to Jackson Hole's working people; and Teton Youth and Family Services, which provides a variety of programmes to support at-risk youth in the community. The Community Foundation of Jackson Hole holds an annual fund-raising event for the benefit of all non-profit organizations known as Old Bill's Fun Run for Charities. The event has raised more than US\$33 million over the 8 years it has been conducted.

Jackson Hole's amenity migrants have also been an important force in protecting the environment in Jackson Hole. Their financial support enables some 25 non-profit organizations to work on behalf of Jackson Hole's open lands and wildlife. These include advocacy organizations, including the Jackson Hole Conservation Alliance, Greater Yellowstone Coalition, Sierra Club, Keep Yellowstone Nuclear Free and the National Parks Conservation Association; groups with a species-specific focus, such as Trout Unlimited, Ducks Unlimited, the Cougar Fund, the Rock Mountain Elk Foundation and the Yellowstone Grizzly Foundation; organizations that focus primarily on research, including the Northern Rockies Conservation Cooperative, the Wildlife Conservation Society and Craighead Environmental Research Institute; and environmental education facilities like the Teton Science School and the Murie Centre.

One of the primary financial investments amenity migrants have made to protect Jackson Hole's environment is in direct land protection. The Jackson Hole Land Trust, founded in 1980, has protected more than 6070 ha in and around Jackson Hole with conservation easements. The land includes 931 ha of bald eagle nesting and wintering habitat, 1700 ha of moose winter range, nearly 405 ha of deer winter range, 81 ha of elk calving grounds, 16 ha of pronghorn antelope crucial summer range, 19 km of scenic highway frontage and 40 km along trout streams (Jackson Hole Land Trust, 2004). The Nature Conservancy is also active in Jackson Hole.

In addition to providing their money, amenity migrants are active advocates on behalf of the environment. Twice in the past 2 years, citizen-initiated referenda have overturned decisions to develop land and significantly increase the community's population. Citizen comments were also instrumental in removing key lands in

the Bridger-Teton National Forest from oil and gas development. Decision makers in both the private and public realm must expect to hear from local activists when they consider an action affecting the environment.

Conclusion

Those who approach matters from a statistical and/or scholarly perspective are hesitant to conclude without vigorous analysis that the population growth resulting in large part from amenity migration degrades the environment. Most environmental advocates have no such hesitation. The above examples illustrate the types of impacts amenity migrants are having on one of the most environmentally important areas in the USA – Jackson Hole. Some of the impacts are undoubtedly positive. Yet those positive impacts are not what make Jackson Hole most unique. There are hundreds of communities with pre-

miere public facilities. There are very few with a full complement of wildlife species.

Amenity migrants are drawn to Jackson Hole because of the unique qualities inventoried above. However, their very presence threatens that unique quality. Jackson Hole has done better than many communities in working to preserve that uniqueness. These efforts have not prevented degradation of the environment. They have only slowed it.

The key to preserving the environments of the world's most special places is to adopt a long-range vision. It is far too easy to focus solely on the short-term gratification offered by living in a house that allows you to watch moose grazing outside your window or climbing the Grand Teton or boating the rapids in the Snake River Canyon. The real challenge is not to spend a large amount of time considering whether amenity migrants impact the environment. It is rather to develop a strategy for determining how the tremendous energy people have for special places can make a real difference in preserving them.

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7 Gateway to Glacier: Will Amenity Migrants in North-western Montana Lead the Way for Amenity Conservation?

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Introduction

Flathead County, Montana, has joined the growing ranks of scenic, high-amenity western communities that have been discovered by Americans who are able to choose where they live (Howe *et al.*, 1997). The county and its three incorporated cities, Kalispell, Whitefish and Columbia Falls, are a gateway to Glacier National Park, vast wilderness areas, large sparkling lakes and splendid outdoor opportunities. The boom in amenity migration to Flathead County began in earnest in the late 1980s, mirroring a trend found in other western national park gateway communities (Fig 7.1). A comparison with counties not adjacent to parks with similar regional economic and population characteristics in 22 western states demonstrates that national parks and other federal lands are a major attraction for new migration and economic activity (National Parks Conservation Association (NPCA), 2003).

Following a decade of painful economic transition for a community historically tied to natural resource extraction, Flathead County's population grew 26% during the 1990s. Few migrants came for jobs. Rather, they chose to relocate because of the scenic mountains, lakes and rivers, small-town character, abundant outdoor recreational opportunities and proximity to Glacier National Park. Many were drawn to the sense of freedom often found in wide-open spaces, or they

saw themselves as escaping an unacceptable lifestyle elsewhere. Some brought jobs and income with them, but many found employment only after arriving. Others started new businesses, bought an existing one or charted a path for self-employment (Snepenger *et al.*, 1995; Lathrop, 2003). Fuelled by new technologies, North America's shift to a brain-powered, service economy and demographic trends, conventional labour markets have turned upside down in the Rocky Mountain West. Historically, people migrated from boom town to boom town, following the latest mine, railroad spur or dam project in search of work. Today in Flathead County, jobs follow people instead of the other way around (NPCA, 2003). Despite a surge in the numbers of working-age adults, Flathead County's unemployment rate dropped to its lowest in three decades by 2005. Beginning in the late 1980s, per capita income grew faster than the national average. Poverty rates fell. Total wage and salary income grew 50% in a 10-year period, and the number of businesses with employees grew 44% during the 1990s (NPCA, 2003).

Flathead County residents have poorly understood the nature and magnitude of these changes swirling around them. As reflected in mass media, county policies, political campaigns and election results, valley residents have seen their communities mired in poverty, struggling to reverse a decline in traditional industries (see, for example, Flathead



Fig. 7.1. Sprawling valley of development north of Flathead Lake, Flathead County, Montana, USA. (Landsat image, July 2001: courtesy of M. Abrams, US Jet Propulsion Laboratory).

County, 2004: 1–8). Mechanization, distant corporate decisions, global markets and the depletion of the richest resources had taken a toll on jobs in timber, agriculture, aluminium smelting and railroads. Bitterness and pessimism, rather than hope, characterized public discourse for most of the past two decades.

The predominant focus on yesteryear's economy over the past two decades came with a price. Any type of economic development and investment was heralded, and community standards for quality were low or non-existent. A collaborative community attempt to update the county's land-use master plan in 1994 was upended when a self-proclaimed property rights movement sparked a vicious campaign of accusations and personal attacks. The plan's focus on non-prescriptive tools and incentives for compatible land uses fell short of county-wide zoning, but it was vilified just the

same. Leading the charge against the county master plan update were recent migrants to the area, refugees from more urbanized areas who feared government intrusion into their new lives of rural freedom. These new and often charismatic leaders struck a chord with both newcomers and long-time residents, appealing to the conservative sentiments of many recent migrants as well as native residents' general resistance to change of any type.

'People came here to get away from zoning,' said Chris Brown, chairwoman of Montanans for Property Rights, in a 1994 interview with *High Country News*. 'Who has the right to tell somebody who pays taxes what they can and can't do with their lands?' (Williams, 1994: 3). To many amenity migrants, Brown's group defended their interest in escaping from governmental intrusion, rules and regulations. For these migrants, unfettered freedom was the paramount amenity.

The counter-point in the same article was provided by Bill Dakin, Chairman of the Flathead County Planning Board, a Flathead Valley native and a real estate agent: 'We realized our prosperity was based on quality of life, and that that quality was threatened by a total vacuum of planning and zoning' (Williams, 1994: 2). Dakin spoke for both long-time residents and newcomers who choose to live in the Flathead Valley for its clean air and water, open spaces and diverse recreational opportunities. To them, these are the qualities that distinguish Flathead County from many other rural western communities.

Despite approval of the plan by its designated planning board and its sponsorship by the valley's leading businesses, the County Commission put the plan to a popular vote. It was soundly rejected. A decade later, the county's land-use plan has still not been updated to reflect the new challenges of dramatic growth. But a decade after the Flathead land-use plan was rejected, the community's political culture is moderating. After nearly 20 years of steady growth, competing amenity values have clashed and new leadership is stepping forward to find creative resolutions. And once again, some amenity migrants are helping build the new ideological bridges between native residents and more recent migrants, creating practical solutions by appealing to people's sense of freedom as well as their sense of community and love for the great outdoors. The unanswered question is this: will amenity migrants and long-time residents muster sufficient force of will and action to maintain the valley's special values in the face of rapid growth and change?

A Wrenching Economic Transition

If the Flathead Valley ever had an icon industry, it was timber. Forested mountains with peaks of 2700 to 3300 m sprawl in any direction, catching moist coastal fronts as they stall at the Continental Divide. The timber industry never fully recovered from the recession of 1982, as it was buffeted by major forces for the next two decades. The easiest, largest timbers had been felled. Industrial forest land was targeted for asset liquidation by distant corporate executives. Public demand for environmental precautions increased just as the industry set its gaze on the

steep, high-elevation slopes of public land. Lawsuits by environmental groups over water and wildlife snarled the US Forest Service. Meanwhile, wood prices stagnated as global markets were awash in timber from the warmer, flatter plantations of the American Southeast or the remaining virgin forests of Canada (Thompson, 2000). During the late 1980s and 1990s, newspaper headlines regularly tracked the success of legal challenges that stopped logging in roadless areas and other controversial areas. Many felt their lifestyle, as well as their livelihoods, were under siege. A billboard was erected (and was still standing in 2005) asserting, against all evidence, that the timber industry accounts for half of the Flathead economy. Log truck convoys drew large rallies to sawmills facing closure. Environmental activists were denounced and their homes vandalized. Forest Service leaders were threatened and logging road gates were illegally ripped out.

At the same time, Flathead County's population was growing fast, climbing to 80,000 in 2005. And despite the community's dour self-assessment, the economy was booming. Yet the popular image of the 'new economy' was bustling tourism, a service economy dominated by low-wage burger flippers and cappuccino baristas. The emerging service economy was often viewed as a servant economy. In a number of community discussions about the economy, Flathead Valley business leaders were quizzed whether tourism has come to occupy a more important role in the local economy since 1990. To a person, they said 'yes'. And they were wrong. Tourism is a growing and important industry in north-western Montana, growing roughly 30% in inflation-adjusted revenues during the 1990s. But the overall economy is growing at an even faster pace, approaching 50%, as measured by inflation-adjusted growth in total labour earnings. Despite its strength, tourism occupies a shrinking piece of a growing pie (NPCA, 2003).

The declining importance of tourism is most easily attributed to the remarkable diversification of the Flathead County economy. Growth is occurring in such a variety of sectors that Colorado College's 2004 State of the Rockies report found that Flathead County has the most diverse job base among 219 non-metropolitan counties in an eight-state region. The county was ranked third in the Rocky Mountain West for growth in small busi-

nesses (Hecox and Holmes, 2004). The county's dramatic economic growth reflects a convergence of national, global and demographic trends. These forces are adding up to major changes in attractive, mostly rural communities adjacent to public lands in the western USA. Like many of its peer communities, Flathead County's new economic look is being driven by amenity migrants, including the particularly important subgroup of travel-stimulated entrepreneurial migrants.

The Emerging Economy of Flathead County

In May 2003, the National Parks Conservation Association and three researchers at the University of Montana, in cooperation with the Kalispell Chamber of Commerce, released *Gateway to Glacier: the Emerging Economy of Flathead County* (NPCA, 2003). The report traced the county's economic indicators, discussed national and global factors and surveyed local residents, tourists and business leaders. It compared Flathead County with 64 small regional centres in the West, including a subset of nine national park gateway communities. The research team reached six key findings:

- Unemployment rates are the lowest in three decades.
- Poverty rates in the late 1990s dropped 10% below levels a decade earlier.
- In the last decade, per capita income rose by 13% (up from 9% in the 1980s). Median income also sharply increased, erasing losses in the previous decade.

Flathead County's economic vitality is largely fuelled by an influx of new residents. But the numbers also tell a story of an economy in transition, more diverse and more stable than before, providing higher-paying jobs. Growth-driven, quantitative economic indicators, such as new jobs and total income, do not automatically translate into improvements that enhance prosperity and well-being for area residents. Fortunately, indicators of 'qualitative' growth, such as declining poverty rates and unemployment and increasing per capita income, suggest that Flathead County is weathering the transition well. Within this transition is the opportunity to direct economic development to sustain a vibrant economy whether or not the population boom continues.

The Flathead County economy is vibrant, diverse and growing

By virtually any economic indicator, Flathead County is booming.

- 15,700 new jobs were created in the last decade, an increase of nearly 50%. Dramatic increases occurred in relatively high-quality employment areas such as health care, business services, engineering and management services, construction and new areas of manufacturing.
- Population grew 26% between 1990 and 2000, led by an influx of new residents. Net migration accounted for 80% of population growth. In the 1980s, by contrast, population growth was much more modest, with natural change (births minus deaths) contributing 50% more than net migration.
- The business sector saw a net increase of 980 employers, a 44% increase, marking a boom in entrepreneurial activity.

The quality of the Flathead Valley's spectacular natural environment is its chief economic asset

Surveys and interviews with Flathead County residents, visitors and business leaders confirm that the valley's chief appeal is the place itself. The small-town, friendly atmosphere, access to the outdoors and recreational opportunities, scenic beauty, clean water, wildlife and the open, natural setting. Aggregated, they offer a 'quality of life' that is the key economic asset because it draws people to visit, to live and to stay in the area. Most business leaders interviewed believe they could make higher incomes elsewhere but choose to operate in Flathead County largely because of its amenities.

Nationwide economic and technological trends have made it easier for people to live where they want. The Flathead's booming population is a sign of the area's undeniable attractiveness – and a confirmation that the quality of life is the area's chief economic asset. It is what

draws people, income, jobs and businesses here. This finding was reinforced by the 2004 Colorado College report, which found that Flathead County ranks third in the Rocky Mountain West for public lands quality, and tenth in 'recreation hot spots' (Hecox and Holmes, 2004: 30).

In-depth interviews with a randomly selected group of 80 Flathead County business leaders conducted by University of Montana researcher Jason Lathrop revealed that they overwhelmingly consider the recreation opportunities and the people in the community as the most important reasons to live in the Flathead region (Lathrop, 2003). A large majority of these business leaders had moved to Flathead County during their adult years. A total of 47 respondents volunteered outdoor recreation when explaining what they like about the region and 44 said either the people or the rural culture, or in some cases family relations. A great many said both. Nearly all reported one or the other.

Significantly, participants in the survey overwhelmingly said they do business in the Flathead region foremost because they want to *live* there, not because of the region's financial opportunities or the business climate. Respondents overwhelmingly believe they have 'given something up' in order to live in the Flathead Valley. Many believe they could make more money in a larger city, even relative to the increased cost of living there. One of the amenity migrants interviewed, the owner of a computer services firm in Whitefish, summed it up this way: 'The quote to use is "poverty with a view". I took a 50% pay cut to come here.'

While the valley's natural beauty, abundant public lands and outdoor recreation are the leading attractions, residents and business leaders also highlight friendly communities and rural character as important reasons to live in Flathead County. Respondents did not provide a clear or consistent definition of these terms. Rather, they were identified primarily by way of contrast with trends that were perceived as eroding those values. For example, business leaders strongly lamented the steady loss of open space and farmland outside of the county's three incorporated cities as residential and commercial sprawl blurs the lines between traditional communities. They identified increased traffic, road rage, increase in

customer service demands and an increase in 'urban attitudes' as patterns that threaten the Flathead lifestyle.

One amenity migrant's definition of 'friendly small-town character' does seem reflective of the overall attitudes expressed by the business leaders. On any given day, he said, a person can walk down Main Street in one of the Flathead communities, or visit the grocery store or post office, and greet neighbours by name. Busy schedules often evaporate as sidewalk conversations linger, even between acquaintances who may disagree politically. Cordiality, familiarity and respect are valued qualities. Another recent amenity migrant highlighted the openness of Flathead communities to new residents: 'We were looking for a town with an active community, a strong sense of community. This community is very willing to accept newcomers. That's a big difference between Whitefish and other amenity communities where we have lived.' In addition, he said, 'There are no class distinctions in Whitefish, compared to Tahoe or Vail or Aspen. That was important to us.'

Residents of Kalispell and Whitefish, the county's largest cities, echoed these values in separate surveys (Nickerson, 2002). Respondents identified small-town atmosphere and the natural environment as their top reasons for living in Flathead. They also linked these values to the continued vitality of the Flathead economy. 'As long as Whitefish remains a desirable place to live, its economic future is assured. Protect its desirability!' exclaimed one survey participant.

Glacier National Park is an anchor for Flathead County's robust economy

In a county blessed with a spectacular natural setting, Glacier National Park is the centrepiece. It is one of Montana's two most popular attractions for visitors, and tops the list of places local residents take out-of-town guests. Sprawling across a million acres, Glacier is world-renowned for its grizzly bears, glacier-sculpted valleys and alpine splendour. The icon for nearly 200 business names and logos, Glacier also shows up on signboards for hundreds of millions of dollars of high-profile development,

including a proposed mall, a performing arts centre and the redeveloped Big Mountain ski village. Glacier's appeal spans the globe, and it was voted America's best backcountry park by readers of *Backpacker* magazine (Peterson, 2000). Meanwhile, Kalispell was selected in 1999 as America's 'best mountain town' by *Mountain Sports & Living Magazine*, which cited its proximity to Glacier Park (Mountain Sports & Living Magazine, 1999).

Business leaders, especially those identified as amenity migrants, highlighted Glacier as a community icon and a favourite personal destination. More than one-third said they visit Glacier on a weekly basis, and almost half said they visit the park three to ten times a year. Only 13 business leaders out of 80 interviewed in the survey said they rarely or never visit the park. The business sector most clearly on the front line of the amenity migration wave, construction and real estate, is the most adamant about the economic importance of Glacier. Broadly speaking, survey participants from the real estate and construction sectors described a Flathead economy largely driven by in-migration, and they believe Glacier to be the key amenity in attracting this migration. Further, most respondents in this sector reported that the presence of Glacier and the surrounding wild country improves their ability to find and hire quality workers (Lathrop, 2003).

Proximity to national parks is an economic advantage for gateway communities such as Flathead County

An assessment of national park gateway communities around the West shows that Flathead County's booming economy reflects a much larger pattern (Swanson, 2002). Attracted by small, friendly communities and appealing landscapes, many Americans turned their attention from major metropolitan areas and traditional warm-winter retirement havens during the 1990s. Rapidly growing populations in communities adjacent to national parks throughout the West suggest the special appeal of these places. This appeal has translated into economic vitality for gateway counties such as Flathead, which tend to have richer, more diverse and more

thriving economies than do similar counties that are not gateways. In these counties, tourism is but one piece of a rapidly expanding economic pie.

The assessment by University of Montana regional economist, Larry Swanson, looked at 64 counties, including Flathead County, that serve as small regional trade centres in the 22 contiguous western states. Nine of those counties are located near a large national park. The park gateway communities outpaced their non-park peers during the 1990s in net migration, new employment and wage and salary growth. The population of park counties grew 26% in aggregate, primarily by in-migration. Non-park counties grew 10%, primarily because the number of births exceeded deaths.

The Flathead Valley's most valued qualities and primary economic assets are at risk

Many local residents believe that the valley is losing some of its special qualities, most notably its rural, small-town character, farmland and open spaces. Returning visitors to Glacier National Park have noted declines in the condition of the natural environment, wildlife viewing opportunities and the amount of open space. Three times since 2001, Glacier has been listed by the National Parks Conservation Association as one of America's most endangered parks because of severe funding shortfalls, dilapidated infrastructure and the encroachment of haphazard development on wildlife habitat outside the park.

A common sentiment expressed by residents, visitors and business leaders is that the Flathead's attractiveness is tied to its unique character. Without exception, business leaders characterized the Flathead as a region uniquely worth living in. The majority had moved to the area for the amenities it offers and were not disappointed. Not a single respondent talked of plans to leave the area (Lathrop, 2003). Yet Flathead business leaders, as well as the residents and visitors surveyed separately, expressed concern that these distinctive qualities could be lost as the Flathead's appearance increasingly resembles other places in America (Nickerson, 2002). More than three-quarters of Kalispell residents

said they are concerned about the loss of open space in their community (Dillon and Praytor, 2002). A large majority of Whitefish residents, meanwhile, said the most important issues for the future of Whitefish are to maintain the character of Whitefish and to protect the natural environment (Hingston Roach Group, 2001). Both communities are concerned about unplanned growth.

Flathead residents also expressed concern about a growing disparity in incomes and the impact of sharply rising property values on workers and young families struggling to find affordable housing. These concerns are fuelled in large part by a dramatic increase in the construction of second homes by part-time residents whose primary residence is elsewhere. Although precise data are not available, economists estimate that at least a quarter of the Flathead's construction boom is for second homes (L. Swanson, Montana, 2004, personal communication).

One of the most contentious issues in the county, especially in the North Valley community of Whitefish, is gated communities. Local residents have lobbied successfully in a couple of instances to block gated communities, arguing that they will convert the community from a 'real place' to an exclusive resort divided between workers and the people they serve. Several gated communities have been permitted by county commissioners, primarily for high-end, second-home owners, but they remain less prevalent than in many high-amenity communities.

Land-use planning and environmental protection was a big priority for business leaders, as well. An independent survey in 2001 of members of the Kalispell Chamber of Commerce found that chamber members are more than twice as likely to support more land-use planning than less (A&A Research, 2001). A major concern expressed by many of the business leaders interviewed by Lathrop (2003) is a decline in water quality, particularly in Flathead County, due to residential septic fields and commercial development polluting the valley's shallow aquifer. And nearly half of the business leaders interviewed by Lathrop reported believing that the unplanned growth in the area could one day begin to act as a drag on the region's economy, particularly for those sectors dependent on tourism and immigration. Participants who have lived in loca-

tions other than the Flathead rated this threat from unplanned growth more strongly. A few specifically identified their fears of the Flathead becoming like the place they moved from. A number of survey respondents noted that amenity migrants will not necessarily remain loyal to a place that is losing its distinctive appeal. 'If you don't have the wildlife and resources and clean water, not only will the people who are visiting here stop coming, the people who live here will leave,' said the manager of a western-wear store in Kalispell.

Since virtually all amenity migrants have first visited their future community as a tourist, the long-term implications of poorly managed growth on amenity migration can be glimpsed by assessing the attitudes of repeat visitors to Glacier. A couple from California described their trip through the Flathead Valley in an in-depth interview with Montana's Institute for Tourism and Recreation Research.

I wouldn't drive up the Flathead Valley again.... There's a lot more sprawl than I expected, (especially in the) Flathead Valley for sure. Really, I mean Missoula basically to Whitefish looks a lot like Oregon. It looks a lot like California. Where little towns stop being little towns and there's kind of sprawl. I haven't been here since '61, so it's been a long time. But I was surprised at how many people and kind of how much spread of suburban Montana there was. And I would say, for me I think my expectation was that it was going to be a little wilder than it was. And that was a little bit of a disappointment.

(Nickerson, 2002: 13).

Unfortunately, even among the 80 business leaders interviewed by Lathrop in 2002, there is a strong sense of a leadership vacuum in Flathead County. More than half of these participants, across all business sectors, reported that no leaders in the region reflected their outlook on how growth should be managed. They very often expressed pessimism about the quality of individuals willing to run for public office. They also believe that most who are willing to step forward in a leadership position have an extreme position on some topic. In general, the business leaders had a negative impression of environmental groups, which they saw as overzealous, litigious and excessively hostile toward traditional industries such as logging (Lathrop, 2003).

The Flathead must encourage high-quality economic growth and development by protecting and investing in its amenities

From a strictly economic perspective, Flathead County is in an enviable position for maintaining the vitality and diversity of the economy, whether or not the population boom continues. The opportunity lies in using current population growth as a 'bridge' in the process of re-tooling and transitioning the area's economy, better positioning Flathead County and its communities for future prosperity. The challenge, on the other hand, lies in not permitting the very qualities that bring more and more people and businesses to the Flathead to be irreparably degraded as this growth continues. In order for growth to be sustained and in order for growth to provide both quantitative and qualitative gains for the area, it must be managed and guided.

Flathead County has enjoyed great success in creating jobs and attracting development and investment. The valley's communities must now create a clear strategy and focused initiatives to improve the well-being of Flathead residents and protect the area's most vital economic assets. This focus will help Flathead County maintain the quality of life that old-timers, newcomers and visitors find so appealing. High-quality economic development means maintaining water quality, wildlife habitat, an appealing landscape and the valley's friendly small-town character. It means retaining working farms and forests, cultivating jobs with pay and benefits that can fully sustain workers and their families and investing in a well-educated local workforce. Economic growth can be guided to support and protect the values that drive it, rather than leading inexorably to their erosion and loss.

Collaborative Action from a Base of Shared Values

The team that produced the *Gateway to Glacier* report committed to apply their findings in a constructive way that would assist the community in addressing these opportunities and challenges. However, the team recognized the difficulty of doing this in an atmosphere of heightened acrimony, distrust and political polarization.

In the Flathead Valley, no clear picture has yet emerged of what action would best help the valley get a handle on growth and encourage the kinds of recreational, residential and commercial development that enhances the lives of area residents. Indeed, views diverse significantly on this question, and the local political climate may stand in the way of achieving consensus.... (Yet) between the extremes is a vast middle ground and ample room for compromise and action. In the face of these challenges, people in the Flathead share similar concerns about the future. (NPCA, 2003: 28).

The report concluded with a recommendation that Flathead communities and leaders engage in a community dialogue to guide development and sort out 'good growth' from 'bad growth'. Valley residents should not count on elected local officials to develop a long-term vision and strategies, as they are often overwhelmed by the immediate crush of development pressures. Instead, residents need to engage in collaborative partnerships to respond to the challenges of rapid growth.

The National Parks Conservation Association (NPCA) in 2003 and 2004 engaged in an aggressive public education campaign to dispel the stubborn notion that environmental protection is at odds with economic prosperity, to ease community polarization and to spark leadership for collaborative action. Well-known business figures and community leaders stepped forward as media spokesmen. Numerous presentations by the project's lead economist, Larry Swanson, were well attended. A summary of the report's findings was mailed to nearly one-third of Flathead households. The report was discussed at Rotary and Kiwanis meetings, college classes, business group breakfasts and leadership development seminars. Politicians seeking local office from both Republicans and Democrats picked up on its themes.

Spurred by the dialogue galvanized by the report, the valley's five chambers of commerce joined with other groups, including NPCA and the University of Montana's Centre for the Rocky Mountain West, to sponsor a series of public forums called Flathead on the Move. The purpose of the forums was to 'cooperatively examine economic opportunities and challenges in the Flathead Valley and develop strategies to

promote economic prosperity', according to a 2004 brochure. Liz Harris, president of the Flathead's public-private economic development organization, Jobs Now Inc., told a local newspaper reporter that the *Gateway to Glacier* report was a catalyst for Flathead on the Move, by helping the community understand how national trends have brought growth and change to the Flathead Valley. 'People are taking their jobs to where they want to be,' Harris said. 'They figure out where they want to live, and they find a way to make a living' (Peters, 2004: 1).

However, sceptics warned that public dialogue and visioning exercises have limited value if not accompanied by concrete action. What was needed, they said, were living examples of collaborative, community-based initiatives to maintain the valley's most threatened amenities in the face of rapid growth. A small group of recent amenity migrants stepped forward to provide just such a model.

Case Study: the Whitefish Area State Lands Committee

The State of Montana owns and manages more than 2.4 million ha, including 120,000 ha of productive timber land in north-western Montana. Like state lands in other western states, these lands were given to Montana by the US government at the time of statehood to provide income for schools. These public lands are managed for public access, multiple use and revenue generation by the five state-wide elected officials, a Land Board chaired by the governor. While some states quickly sold these lands to generate income, Montana developed a strong political tradition of maintaining public ownership and leasing lands for farming, grazing, timber, oil and gas development and summer cabin sites. The Montana Constitution places severe limitations on the sale of state lands by the Department of Natural Resources and Conservation (DNRC), the agency responsible for day-to-day management. Observing the booming population and soaring property values in Flathead County, DNRC determined that the revenue-generating mandate for state lands required it to more aggressively pursue the 'highest and best use' of state lands, including the option of land sales and

conversion of traditional timber lands for residential, commercial and resort development.

The strongest property values were found in the north valley, near Whitefish, which has the county's highest amount of state forest land. In spring 2003, DNRC announced plans to examine 5200 ha of state-owned forest surrounding Whitefish for their appropriate highest and best uses. These were largely in the foothills on the valley's edge, below the forested mountains managed by the federal Forest Service. True to form for the Flathead Valley, the community erupted in anger. A public meeting called by DNRC became a textbook example of how not to engage the public. Four hundred people showed up at a meeting room with capacity for 150. A flip-chart presentation could not be read by many of those who were able to squeeze into the room. The atmosphere was charged with suspicion.

DNRC hired a team of consultants to develop a land-use plan and solicit input from the community. Initial discussions focused on standards for development, such as construction limits on steep slopes. But Whitefish residents were not buying the premise that development was the best way to go. The leading public concern was public access and recreation. Following two decades of large-scale conversion of working farms and forests, private lands outside town were festooned with orange no-trespassing signs. This had increasingly concentrated biking, hiking, horseback riding and cross-country skiing on to state lands. Residents also expressed concern about the impact of new foothill subdivisions on clean water and native trout, grizzly bears and elk. They worried about the cost to existing taxpayers of providing public services, including the growing spectre of fighting wildfire in the wildland-urban interface. They complained about the prospect of trophy houses sprouting on scenic ridges now classified as public land.

A flurry of public meetings provided an opportunity for newcomers to meet old-timers, and several informal groups formed to protect community interests. One of the organizers of these meetings in early 2003 was Marshall Friedman. Marshall and Kathy moved to Whitefish in 2003, refugees from two previous amenity communities, North Tahoe and Chico, California. Marshall owns properties and other far-flung business ventures, and he and Kathy

travel frequently, illustrating the importance of a convenient airport to amenity migrants. One of the top criteria in their search for a new home was recreation in a beautiful setting. They also looked for a 'real place with a sense of community'. When they took a close look at Whitefish, they saw a tremendous readiness to volunteer in community projects and finance improvements like a new library, theatre and hockey rink.

Soon after they moved to Whitefish, DNRC announced its plan to review land uses on 5200 ha, including a parcel near the Friedman's home. The Friedman's had seen what happens when huge parcels of land are put on the development block in fast-growing communities and they were alarmed. 'We moved here because it was like it was, and this had the potential to change all that,' Marshall recalled a couple of years later. 'We lived in other places overrun by unrestricted development, and it looked like the same could happen here. I wasn't going to have this happen a third time without doing something to protect what makes Whitefish special' (M. Friedman, Montana, 2004, personal communication). Soon after moving to Whitefish in 2003, Marshall emerged as a respected leader of an *ad hoc* group that began to meet weekly at the local library. An eclectic mix of around 25 people participated at various times, natives as well as newcomers. The group decided to ask the Land Board to charter a community committee to jointly develop a plan with DNRC. Marshall was part of the informal delegation, mostly recent migrants to the community, which negotiated the agreement with DNRC and the Land Board.

'There's new community receptiveness to new ideas,' observed Whitefish Mayor Andy Feury (Montana, 2004, personal communication), after he and a county commissioner appointed members of a Land Board-chartered land-planning committee. Friedman was among more than a dozen appointed to the committee, which also included, among others, timber workers, an educator, realtor, credit union president, DNRC land managers, a chamber of commerce executive and the leaders of a rifle club and a mountain bike club. 'Local people are more willing to listen, because things are changing so fast and newcomers have seen what happens if you don't protect what makes a place special,' Feury said. 'That's a change in mindset in our community. It wasn't too long ago that this was a pretty

closed community, unwilling to accept an outside perspective of how things can be done. Amenity migrants have come to play a hugely constructive role in our community' (A. Feury, Montana, 2002, personal communication).

Feury has experienced his own changes since he graduated from high school in Kalispell. He joined his father in the timber industry, eventually taking over a lumber-brokering business. In recent years, the Mayor diversified his entrepreneurial pursuits to include the manufacture of plastic mouldings in Korea. His travels around the world make him painfully aware of how precarious the Flathead quality of life is. 'The ability to engage in the community and make a real difference is something that people are losing around the country,' Feury said. 'That's still possible here, and people love that' (A. Feury, Montana, 2004, personal communication).

A year after the Land Board's community advisory committee was convened, it completed an innovative land-use plan. The plan established a detailed framework for conservation easements, public trails, public access, cluster developments, limited land sales and wildlife protection. With overwhelming support from the Flathead community, the Land Board unanimously approved the plan. 'It wasn't easy, but in the end, everybody was happy,' Friedman said of the committee process. 'There's a commonality that unites the old-timers and the new people. We all live here because it's a distinctive, active community with open space and recreational opportunities. Passions are so high here compared to other places because what's at stake is lifestyle, the social fabric of the community' (M. Friedman, Montana, 2004, personal communication).

Changing Ground, Common Ground

As the pace of amenity migration, development pressure and community change accelerated at the beginning of the 21st century, the conservation community of the Flathead Valley found itself in the political hot seat. Frustrated with the priceless natural resources being lost and the bitterness of political discourse, NPCA and other conservation groups began exploring ways to improve civil discourse and resolve conflicts. The groups hired a research firm to conduct

focus groups with Flathead residents to better understand the sources of anger and the bridges between factions that might be built. An important conflict resolution strategy is to drill down to people's fundamental interests, so as to move beyond entrenched positions, stereotypes and ideology. As issues and context change, deeply held positions often lose relevance and new approaches are needed. When people cling to outdated positions, it is often because they have confused their passionate response to an issue with their fundamental interest. A position is usually oppositional and often skewed by misperception or outdated information, while a fundamental interest is positive and personal. Conflicts can be resolved when participants identify and address each other's fundamental interests. Innovative solutions can be envisioned and enacted when participants find they share the same fundamental interests. When enough individuals in a community share fundamental interests, this is known as the core values of a community.

Four focus groups, two each of men and women, revealed the strong passions that Marshall Friedman observed in the Flathead. But researcher John Russonello also concluded that residents so quickly at each other's throats actually share many of the same core values (Long, 2002). He identified four fundamental interests that united most Flathead residents:

- freedom and individualism;
- financial security for families;
- sense of community; and
- appreciation for beauty of natural surroundings.

The phenomenon of amenity migration creates a new dynamic in which each of these core values can be mutually supportive. Amenity migrants, including the new entrepreneurs who bring talent, invest money, create jobs and diversify the economy, are creating enormous opportunities for financial security in the Flathead. In turn, they want to be part of a friendly and 'real' community. They have a particular affinity for the great outdoors. And they are attracted to Montana's wide open spaces, relatively thin population and the sense of freedom that goes with it. Long-time residents share these same interests,

although they may look for financial security in the local sawmill instead of an information-age start up. They resent the multiplying no-trespassing signs and proposals to sell public land as an erosion of personal freedoms. They make up the core of the USA's most active population of hunters and anglers (A&A Research, 1999) and they love Glacier National Park with the same passion as newcomers. And they have a deep sense of attachment to their community (Nickerson, 2002: 8).

In the emerging economy of Flathead County, the natural environment and the valley's numerous distinctive communities are the most important economic assets. An understanding of the opportunities and challenges associated with these economic changes can focus energies in a way that bridges core values. Left behind would be the old 'environment vs economy' dichotomy that has calcified positions for many years in the valley.

The Whitefish Area State Lands Committee provides a model for future collaborations. For example, a major concern among all Flathead Valley residents is the loss of working farms and forests, which can be understood as grating against core values in multiple ways. This group did not get locked into a battle about logging practices, a contentious issue of the past. Instead, it affirmed a broad public interest that traditional forest lands are better managed for sustainable timber production and public access than converted into a hotch-potch of sprawling ranchettes and foothill subdivisions. The state lands group also recognized DNRC's mission of generating income for schools, so they envisioned new opportunities to generate additional income while maintaining the broad community interest in those public lands. They did this with an innovative, flexible plan developed by citizens rather than a prescriptive rulebook handed down by government. This helped appease property-rights advocates.

The challenge for an emerging generation of Flathead Valley leaders is to help the community navigate beyond a minefield of inflexible positions, angry stereotypes and wagging fingers. The new economic realities in the Rocky Mountain West provide unique opportunities to build bridges that connect community core values. If

recent experience is a guide, amenity migrants can play a critical role in building those bridges in Flathead County. When Flathead communities and their leaders are receptive to the input of newcomers, amenity migrants have shown a willingness to step forward in a leadership role to address new challenges.

The amenity communities that are growing so fast in western North America are a finite resource. There are few beautiful and friendly places that remain undiscovered. No longer can an amenity migrant presume that the grass will be greener on the other side or at the next stop. We must all become better gardeners at home.

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8 Alberta's Amenities Rush

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Living in Paradise

This chapter is adapted from materials prepared for The Chinook Institute's Open Space Toolkit, a series of four workshops designed for land-owners and other conservation-minded individuals who are interested in protecting and maintaining natural landscapes at the community level. Alberta's Natural Amenities Rush is the first module (Chinook Institute, 2005). Other modules will focus on the value of natural landscapes as open space; case studies of community response to amenity-driven growth; and tools available to people working to keep open space open.

Ask Albertans to describe their province and the chances are they will conjure up images of immense blue skies, small prairie towns, fields of wind-rippled grain, rolling foothills, forests without end and glacier-capped mountain playgrounds. It is a big land, they will say, with plenty of water and soil and timber and oil and... thankfully... plenty of elbow room, too.

The images may be time-worn, but they still hold considerable truth. In fact, they are integral to the way Albertans think of themselves. It does not matter that over 60% of Albertans now reside in the metropolitan areas of Edmonton and Calgary (Roach, 2003), they still consider themselves rooted in the country. All those distant vistas and all that open space helped shape their character and values, and they like to see those values reflected in the places they live.

Indeed, for many, the dream of the good life revolves around a home in the country or a small town. Whether it is a permanent residence, a week-

end retreat or a planned retirement home, they define their 'little piece of heaven' as a place with a long view, quick access to the great outdoors and room to breathe. They consider such attributes the foundation of their Western entitlement.

It comes as no surprise, then, that even as the population as a whole is drawn toward the economic opportunities and cultural advantages of the metropolitan cores, the greatest population growth is taking place at the cities' far outskirts. It seems that while Albertans accept urban centres as a necessary part of their lives, and enjoy much of what they have to offer, they also despair at their congestion, traffic, noise and hurried pace. Given their preference and the means, they will build homes in places that have fewer people and provide quick access to good old Mother Nature.

The Canada West Foundation has identified 'rural metro-adjacent' regions (RMAs) as one of the primary locations in which Albertans are settling. RMAs lie outside the core of the city, but are 'directly adjacent to the urban cores and/or within a reasonably short commuting distance' (Azmiar and Dobson, 2003: 2). RMA growth does not reveal the entirety of Albertans attraction to living beyond the city, but it does reflect a big part of it (Fig. 8.1).

While RMAs include places like Cochrane and the Municipal District (MD) of Foothills, which are close to Calgary and Edmonton, there are other municipalities a bit further away that are proving equally seductive as places to settle. These are communities the Chinook Institute calls 'amenity centres', where the big attraction is the natural setting, access to outdoor recreation and a

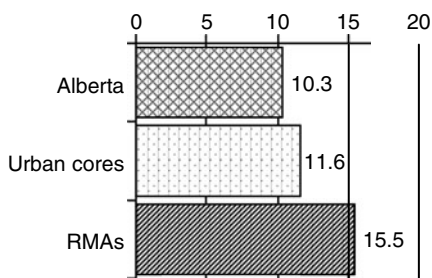


Fig. 8.1. Per cent growth in Alberta urban cores and RMAs, 1996–2001. Source: Azmier and Dobson (2003).

distinctive community character. The growth in these communities, with Canmore an example, has been every bit as spectacular as that in the RMAs (Fig. 8.2).

Whether the discussion is about metro-adjacent areas or amenity centres, new technologies and new thinking about work, combined with the long-term prosperity of the province, have given Albertans the opportunity to enjoy the best of both the city and the countryside, and they are taking full advantage of it. Each year thousands of them go looking for paradise, and when they find it, they put it to use. For those with a job in the city that requires a daily commute, a location within an hour's drive of the urban core is considered reasonable. For those whose jobs are more flexible, or who can afford a second home on the lake or at the ski hill, a 3- and even a 4-hour drive is acceptable.

Ironically, as more and more of them settle at or just beyond the urban fringe, the country-

side and the small communities begin to feel less and less like the places they sought. The open lands around them are bought up and subdivided, a new development cuts across their view of the foothills, the bright lights and noise they thought they left behind begin to intrude on their newfound solitude and they find themselves sharing their favourite recreation areas with increasing numbers of new neighbours. Further, some of the urbanites who move to rural areas discover themselves uneasy with certain aspects of their new rural lifestyle. And when their bucolic expectations collide with the reality of sharing country roads with agricultural equipment in the summer, waiting for snow ploughs in the winter or encountering unfamiliar and eye-watering scents on an evening breeze, they show their roots by pressing for reforms that will appease their urban sensibilities.

The adopted communities, of course, have their own stories to tell. Many of them have been inundated in recent years by two big waves of change and staying afloat has not been easy. The first wave was the discovery that their traditional economies – based on resources that can be grown and harvested, dug up or cut down – are facing strong competition from other parts of the world where the same resources can be grown, dug up, cut down and, critically, sold for much less. The second wave has been the arrival of the new migrants, who have brought with them all the economic, social and environmental challenges that accompany rapid population growth.

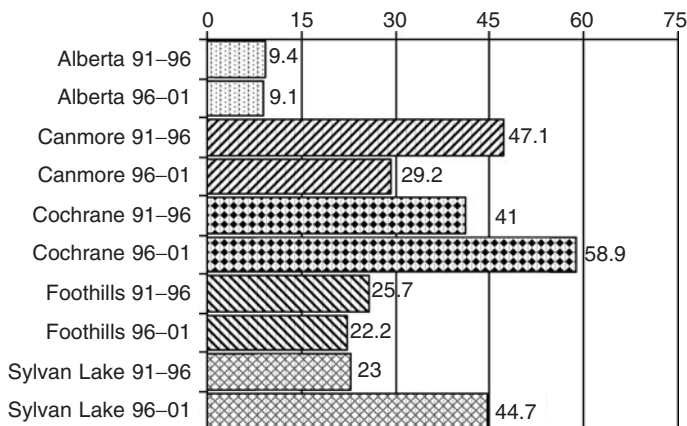


Fig. 8.2. Per cent growth in four Alberta communities, 1991–2001. Source: Korber (2004).

To make matters even more confusing, the true nature of the change is rarely immediately apparent. Most communities, in fact, have little to no comprehension of the forces that are driving the change, and those few that do have less power than they would like to influence the results. The scale and the pace of change can outstrip the communities capacity and resources to either plan for it or manage it (Korber and Rasker, 2001). Demand for community services and infrastructure soars while affordable housing disappears; community character, social cohesion and rural values come into conflict with transplanted urban sensibilities; landscapes and wildlife habitat are fragmented; environmental quality is degraded; and natural landscapes that have been taken for granted for decades are annexed, subdivided and disappear under strip malls and tract homes.

While the community may experience a new economic prosperity, many long-time residents experience the changes as disruptive, unsettling and unwelcome, and even the newcomers soon begin to express concern about what is going to happen to their investment. As one recent arrival to Canmore put it, 'Everybody wants a piece of the golden egg, but it doesn't look like anybody's taking care of the goose. I'm worried we're going to lose both' (Fig. 8.3).

Although the challenges associated with rapid rural development are many, one in particular stands out. The loss of natural landscape is a highly visible phenomenon and represents a tangible loss of what many people value most about country living. Although they may not say it in so many words, they understand that natural landscapes confer ecological, social and economic benefits shared by all, and that the loss of such



Fig. 8.3. Canmore, Alberta, Canada (pop. 12,000, including second-home owners), located on the Bow River in the Rocky Mountains (photograph: J. Groundwater, June 1997).

landscapes diminishes their quality of life. Although 'quality of life' is a catch-all term that is not easily defined, it has to do with that sense of general well-being that comes with our assessment that a given community offers the possibility of living well-rounded, comfortable and engaging lives. Its dimensions vary depending on who is talking about it, but for people considering a move to the country, quality of life considerations almost always include natural landscapes, health and fitness, environment, education, employment and income, municipal infrastructure, security and public safety, and recreational opportunity (Howe *et al.*, 1997; Korber and Rasker, 2001).

'Natural landscape' is a somewhat more tangible term, even though it is used to convey a number of distinctions, including open space, green space, parks and other protected areas and working acreages (such as farms and ranches) where natural processes prevail. Natural landscapes help meet basic human needs by providing ecological services such as groundwater recharge and air purification; they provide habitat for native plants and wildlife; and they provide opportunities for people to connect with nature and with each other in natural settings. They provide the working lands for farms and ranches, and they provide amenities for nearby landowners, residents and visitors who desire scenery, recreational access and rural atmosphere. They bestow economic and fiscal benefits, including property appreciation and the higher sale prices associated with homes adjacent to natural areas (Schachter *et al.*, 1998).

With a growing understanding of the role that natural landscape plays in creating and maintaining healthy communities, prosperous economies and resilient ecosystems, more and more people are seeking ways to preserve natural landscapes as an essential component of their community planning and development.

Amenities rush formula: BB + ECV + {GE + TC} + SE = NAR

Communities will be better equipped to meet the challenges generated by rapid growth if they understand what is driving the change and what its impacts are. Although no one understands the phenomenon in its entirety, several factors have been identified as major contributors. Pulled into a rather

cryptic shorthand formula, they are: the baby boom bulge (BB) + new environmental and cultural values (ECV) + the global economy and technological change (GE+TC) + a strong economy (SE) equals an amenities rush (NAR). We will look at each factor in turn.

Factor 1: BB – the boomer bulge

The generation of Canadians born between 1947 and 1966 – universally recognized as the 'baby boomers' – constitutes the nation's largest single population group. The demographer David Foot, in his popular book *Boom, Bust and Echo*, identified nine Canadian population cohorts: Pre-First World War; the first World War; the Roaring 20s; the Depression Babies (born 1930–1939); the Second World War (1940–1946); the Baby Boom (1947–1966); the Baby Bust (1967–1979); the Baby Boom Echo (1980–1995); and the Future (1996–present) (Foot, 1996).

Members of a given cohort show a remarkable tendency to engage in the same activities at the same time as they move through life. For example, the youngsters who bought racquets for tennis in their late teens are buying binoculars for bird watching in their 60s. This is not only because of the ageing process, but because a given cohort develops collective interests, attitudes and values in response to its members' experience of the world as they age. It is understandable, for instance, that the Depression Babies, growing up in the tight-fisted 30s, would have different expectations and behaviours than the Baby Boomers, who grew up in the financially optimistic 1950s and 1960s.

Of all the countries in the industrialized world, Foot reports, Canada had 'the loudest baby boom'. This was partly because the post-war economy was itself booming and a couple could live on one income; partly because people were optimistic about their future; and partly because young immigrants were flocking to Canada as a place of new beginnings. As a result, the fertility rate soared to nearly four children per woman.

The boom tailed off in the mid-1960s, but not before creating a population bulge that in 1996 totalled 9.8 million people, almost a third of the Canadian population. In sheer numbers, the baby boomers stand head and shoulders above any other cohort (Fig. 8.4) and, as such, they

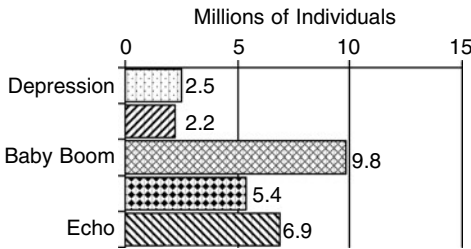


Fig. 8.4. Canadian population 'cohorts', 1996. Source: Foot (1996).

have had a tremendous influence on social trends, values and markets, and will continue to do so well into their retirement years. Much to the dismay of succeeding and smaller cohorts, what the boomers want, the boomers get.

In 2005, the older boomers are beginning to conclude their careers, and the younger ones are either approaching or rounding the corner of 40, placing them in mid-career with spouses, mortgages and teenage children. In general terms, the older boomers have had an excellent financial run and are moving into their retirement years with well-padded pockets. As Ray Rasker, a natural resources economist with the Sonoran Institute, has pointed out, 'the boomers are retiring earlier, doing more and spending more' (Rasker, 2003). The younger boomers have not had such an easy time of it – competing as they have had to with the older members of their cohort – but they have done well enough to do the sorts of things that people in their 40s generally do, including renovating, upgrading, or building new homes and looking for recreational properties where the family can share some quality hours together, boating, skiing, hiking, biking or just hanging out on the deck.

Whether thinking about retirement or pursuing a mid-life upgrade, the boomers – that bulging third of the Alberta population – are looking to the urban fringe or beyond as the place to make the adjustment.

Factor 2: ECV – environmental and cultural values: amenities in shades of green

In 1985–1986, researchers working on a strategic planning exercise for the Alberta Department of Trade and Economic Development identified

two emerging trends that help explain the amenities rush. According to Laurence Moss, the lead consultant for the project, the first trend was 'that a significant shift was occurring in the perception and use of natural resources (Moss, 2004: 20). While part of the population continued to value the resources primarily in the traditional sense – that is, as commodities to be extracted and exported – a growing part of the population valued the resources primarily for what they offered when left untouched. 'Landscapes, their mountains, forests and waters, were increasingly being sought as a leisure, learning and more general living experience (that)... generates contentment and income' (Moss, 2004: 20). The second revelation was that the distinctive cultures of local peoples and rural places were becoming increasingly valuable assets. As Moss concluded, the findings 'seemed important to the future of Alberta, especially for its smaller communities' (Moss, 2004: 21).

The Alberta research captured the essence of a recent phenomenon called 'amenity migration', which is the migration under discussion – people moving to places that offer the positive attributes associated with the countryside, small towns and outdoor recreation. As Moss says, the amenity migrants 'reside (in such places) year-round or intermittently, principally because of (those places)' actual and perceived greater environmental and cultural differentiation' (Moss, 2004: 19).

Exactly what the 'amenities' are that the amenity migrants seek, and how they are defined, are largely a matter of individual perception, but a generic list (Korber and Rasker, 2001; and focus groups conducted by the Chinook Institute, 2004) usually includes:

- a healthier environment, including cleaner air and cleaner water;
- small-town ambience, including a slower pace of life, less traffic, less noise and a friendlier, more supportive and more socially cohesive community;
- lower taxes;
- less crime and more security;
- better schools;
- more open space; and
- increased access to recreational opportunities in natural areas, with wilderness and wildlife a definite plus.

While many of the listed attributes can be lumped together as environmental values, others can be assembled as cultural values. That means people are moving to amenity hotspots not only for clean air, clean water and natural landscapes, but because such places offer a different culture from that in which they have been living. 'Culture' here refers less to the availability of fine art, opera and first-run movies than to the distinctive community trappings, attitudes and identities that differentiate one place from another. Canmore, for example, with a population of 12,000, offers a very different way of life than the metropolis of Calgary, not only because of the different sizes of the two communities but because of a number of deeper cultural attributes, including the Canmore residents' aesthetic and recreational relationship with the surrounding mountains, the town's 'black-collar' coal mining history and, to a lesser degree, its proximity to the Stoney-Nakoda Reserve and the culture of its First Nations residents.

While amenity migration is generally associated with urbanites seeking the good life in the countryside, it also includes the movement of people *from* the remote rural heartland *to* the urban fringes. As Jason Azmier and Sarah Dobson explain in *The Burgeoning Fringe*:

Many city residents are moving out of the cities and into the surrounding countryside to experience more of the natural environment of the West. At the same time, rural residents are moving closer to the cities to be near the economic and lifestyle advantages of the cities, without completely abandoning their rural roots. Rural metro-adjacent (RMA) zones across the West are home to those looking to combine the quality of life advantages of a rural lifestyle and the financial advantages of urban employment

(2003: 1)

The new amenities rush, then, appears to be fuelled by a blending of economic, cultural, and environmental values. But regardless of where individuals might locate themselves within a triangle that pulls toward economic advantage at one corner, natural amenity at the second and cultural assets at the third, all are convinced that new surroundings will lead to a better quality of life and that the improvement justifies the time, money and social and psychological adjustments necessitated by the move.

Who, specifically, are the amenity migrants? Laurence Moss (2004: 21) gives us the following profile of the people settling in natural amenity centres.

Amenity migrants typically have higher formal education and discretionary wealth than the locals where they settle. Yet, many of them are not wealthy, and among them are people who have significantly reduced their income in order to reside in their chosen place. They may or may not earn a living in their high-amenity location, but a considerable percentage continues to obtain income from elsewhere in the form of investment returns or transfer payments. When employed, they are typically plugged into the information economy, and/or derive income from tourism and amenity migration. In general they fall into two categories: resource-consumers and resource-conservers, and to date the former generally dominates.

If we were to invent a composite amenity couple, we might come up with Stephen and Emily Rauch, whose story would be something like the following.

The Rauchs moved to Cochrane from Calgary 4 years ago to, in Stephen's words, 'get our teenage boys out of the city and get us all closer to God's country'. By 'God's country', he means the Rockies. The couple was attracted to Cochrane because of its small-town ambience, its extensive trail network and because the Bow River flows along the edge of town. They also found real estate prices reasonable compared with Calgary's.

Both Stephen and Emily are in their early 40s, are university educated and, by historic Cochrane standards, are relatively well off. Stephen makes good money commuting to his job in the city, where he designs and installs computer networks. Emily took a hefty pay cut by leaving her work at a graphic arts house to pursue contract work in her new home, but is enjoying her new independent lifestyle. The couple also gets some income from investments they made with an inheritance from Emily's parents. They do not consider themselves wealthy though, and Emily jokes about 'the scenery discount' entailed by their decision to move out of the city.

The Rauchs are environmentally conscious, but are also heavy environmental 'consumers' –

heading toward the mountains each weekend with their minivan packed with skis or mountain bikes and camping paraphernalia for the family. Stephen would like to move to Canmore some day, to ‘really get into the mountain thing’, but does not feel he can do so until he is ready to sever ties with his Calgary company. ‘I’d like to start my own consulting operation, which will give me the flexibility I want to make the move,’ he says. ‘It will take us a little while, but I really want to do it. It will be great for Emily and me, and a great place for the boys to come back to once they leave home.’

Obviously, amenity migration plays out differently in different places, but the phenomenon itself, according to Moss, is probably now the single greatest driving force behind the changing face of rural North America (L.A.G. Moss, Alberta, 2004, personal communication). Further, he notes, it is a global phenomenon: ‘People are moving into mountain and upland areas in increasing numbers and at increasing rates – as both visitors and residents. We are most aware of this phenomenon in North America and Western Europe, but it is a global shift also manifest in the mountains of less wealthy countries’ (Moss, 2004: 19).

Factor 3: {GE + TC} – the global economy and technology change

Although it seems at first blush a long way removed from Alberta’s natural landscapes, the third element of the formula involves elements of the emerging global economy, including changes in the ways goods are produced, changes in the types of goods and services now in demand, changes in the types of occupations needed to produce those goods and services and the changes in our information, communication and transportation technologies (R. Rasker, Alberta, 2004, personal communication).

New ways of producing goods

In the 1950s, the North American economy was all about huge corporations turning out high volumes of standardized goods in big factories that combined all of the manufacturing and business elements under one roof. Materials such as steel

– itself produced as standard ingots in massive integrated mills – might arrive from elsewhere, but line workers on the ground floor fabricated and assembled the products while designers, marketers, accountants and company executives on the second floor looked after business.

The decades since, however, have witnessed a production revolution. As Ray Rasker explains, trade barriers between nations were reduced following the Second World War as an aid to rebuilding the world economy, and manufacturers, mindful of ways to reduce costs and increase profits, began to consider new ways of designing, manufacturing, transporting and marketing goods. Even as the one-plant, high-volume production model reigned supreme, new models began to emerge that combined materials, manufacturing and marketing expertise from around the world. Depending on the product, the model might combine low-cost materials from South America, inexpensive labour from Asia, design from Europe, data processing from the Caribbean and North American consumer markets and marketing (R. Rasker, Alberta, 2004, personal communication).

New products and services

As the 1950s and 1960s became the 1970s and 1980s, it became evident that, even if they wanted to, the industrialized nations could no longer rely on mass producing standardized goods to maintain their exalted economic position. Economist and former US Secretary of Labour, Robert Reich, in his 1991 *Work of Nations*, writes that as less-developed nations became adept at low-cost, high-volume production, the corporations of industrialized nations began to look to ‘high-value’ production, which meant supplying customized goods for specialized markets, and to identifying opportunities to create new and specialized markets in the first place (Reich, 1991).

The result is today’s global economy, which resembles nothing so much as a vast, virtual cat’s cradle of internationally intersecting materials, goods and finances. Consider that a car once designed and produced solely in Windsor, Canada may today include materials, fabrications, assemblies and services from as many as a dozen countries, with 80% of the expense going

to design, engineering, financing, patenting and marketing. Or, perhaps even closer to an Albertan's heart, consider the hockey example provided by Reich (1991: 112):

... today's precision hockey equipment is designed in Sweden, financed in Canada, and assembled in Cleveland and Denmark for distribution in North America and Europe, respectively, out of alloys whose molecular structure was researched and patented in Delaware and fabricated in Japan. An advertising campaign is conceived in Britain; film footage for it is shot in Canada, dubbed in Britain, and edited in New York.

Although the global economy is still in its infancy, we can already recognize many of the elements upon which it is being built. And two of those elements – new occupations and new technologies – bring us back to Alberta and its amenities rush.

New occupations

The occupations most valued by high-value enterprises are those that feature the specialized knowledge and analytic skills that can:

1. Solve the constant stream of problems that emerge as part and parcel of our technological era (for example, developing new kinds of alloys that can be combined to build lighter, stronger helicopter blades).
2. Help customers identify new opportunities for employing customized products (for example, finding applications for new alloys that satisfy engineering needs).
3. Get the problem-solvers working with the opportunity-identifiers (for example, raising funds for the production of a new product) (Reich, 1991).

The people that fill such needs are frequently labelled 'knowledge workers' and they include systems analysts, designers, financial specialists, engineers, architects, software developers, information experts, communications consultants, real estate developers, lawyers, organizational management specialists and a worldwide army of other professionals who transform words and data 'into abstract images that can be rearranged, juggled, experimented with, communicated to other spe-

cialists, and then, eventually, transformed back into reality' (Reich, 1991: 178).

In Alberta, the province's natural resource industries – with gas and oil leading the way – continue to dominate the economy, but the greatest number of new jobs created between 1990 and 2000 were knowledge jobs, tucked away in the industrial classification of 'business services', with the greatest percentage found in the 'professional, scientific and technical services' categories (Western Economic Diversification Canada, 2003). Further, according to Alberta Economic Development (2003), the province's emerging economic base revolves around four non-traditional industries: telecommunications and wireless equipment; biotechnology; software development; and electronics and microelectronics (Fig. 8.5).

New technologies

Aside from requiring new types of occupations, the global economy also required advances in computer hardware and software, telecommunications and transportation systems to better coordinate cross-border commerce, shrink geographic scales and collapse time zones. The requisite advances began to appear in leaps and bounds once the demand became evident (R. Rasker, Alberta, 2004, personal communication).

This is critical to the amenity migration story because the new technologies have eliminated the need to have many of the business services – from design to software development to marketing – linked physically to the production and distribution of a given product. The result is that it is no longer necessary for people who design the cars marketed in Canada or the robotics software that helps build cars or the advertising campaigns that sell them to live in Detroit or Windsor, let alone Calgary or Edmonton. Armed with wireless laptops and a list of national and international email addresses, more and more people are setting up business in home offices with a picture window on the mountains or a lake. Known variously to locals as 'modem cowboys', 'flexexecutives', 'off-comers', 'settled tourists' and as we have been calling them, 'amenity migrants', many such people ultimately value lifestyle and location more than career, and will frequently take a pay cut or even change their professions to live in places that are attractive to them. It is no coincidence, as

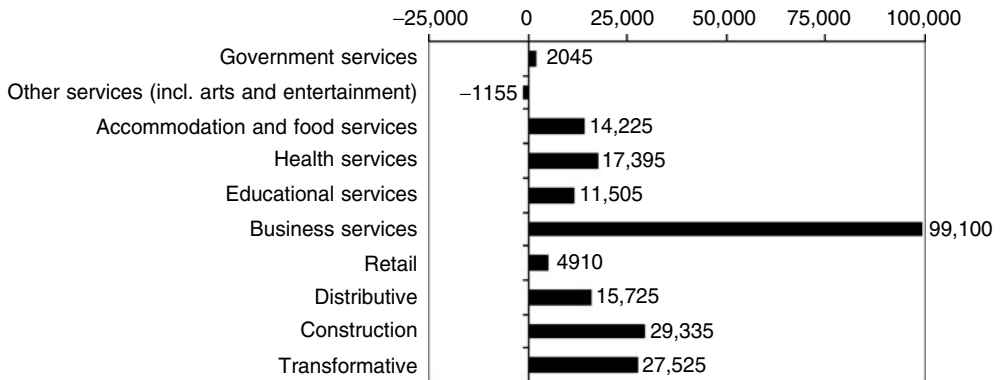


Fig. 8.5. Alberta occupational change, 1996–2001. *Business services* include financial, technical, professional, scientific, management, insurance, real estate and similar services. *Transformative industries* include agriculture, forestry, manufacturing (including lumber and wood), fishing, hunting, mining, oil and gas. Source: R. Rasker, Canmore, Alberta, Chinook Institute presentation (2003).

Laurence Moss has pointed out, that there is a very strong correlation between the beginnings of the communications and information revolution and the rise of what we refer to as amenity migration about 20 years ago (L.A.G. Moss, Alberta, 2004, personal communication).

It is worth noting that the new tools and technologies are not only driving much of the change we are experiencing, but the rate of change itself is increasing. Accordingly, we find ourselves on an endless curve of new learning, continually adjusting to the emerging twists and wrinkles of globalized markets and manufacturing. As old ways of making a living are outsourced or simply disappear, new ways of making a living appear, along with whole new ways of living, period. And some of those new ways are already well established in the Alberta countryside.

Factor 4: SE – strong economy

While the strength of the Alberta economy may not be the prime driver of the province's rural rush, it plays a critical role in how quickly and how far it spreads. Even with the dot.com 'correction' of the stock market, the recent mad cow downturn of the agricultural sector and the reduced tourist trade that followed in the wake of 9/11 and the SARS outbreak, Alberta has been a land of considerable wealth for some years now, and will likely continue to be so for another decade.

What are the current trends? Consider the following list drawn from Alberta Economic Development (2004) and Education Canada (2003):

- Over the past 20 years, Alberta has had the strongest economy in Canada, with an average real growth rate of 3.7% per year;
- Alberta consistently records the highest investment per capita among the provinces, with a total of CAN\$42.2 billion in investment in 2003, and a projected CAN\$42.3 billion in 2004;
- Alberta consistently has one of the lowest unemployment rates in Canada. From 1998 to 2002, the provincial unemployment rate averaged 5.2%, and was 5.1% in 2003. Since economists believe an unemployment rate of less than 5% creates a labour shortage and slows economic growth, a rate of just over five is optimum;
- Simultaneously, Alberta enjoys one of the highest provincial employment rates. In 2001, 69.3% of Alberta's working-age population was employed, by far the highest of any province;
- Between 1991 and 2001, Alberta's employment force increased by 22.9%, the largest gain of any province;
- In 2004, the Alberta government became the only debt-free province in the country, and some economists are speaking of annual surpluses of CAN\$5 to 10 billion.

At the national level, inflation, interest and mortgage rates are all between low and rock-bottom,

which makes a property purchase seems like a reasonable deal even when the property prices are themselves substantial. For the mid- to late-boomers, that means a place in the country becomes a possibility sooner rather than later. As well, the early boomers are discovering it is possible to retire a few years early (the average retirement age is dipping toward 61) in those 'last best places' that offer a front door to the scenery and recreation of the great outdoors, a back door to the convenience and culture of an urban centre and the chance to leave a treasured legacy property to the children.

Although predicting the future is repeatedly demonstrated to be a game for people who do not mind being ridiculed, a number of trends *do* suggest Alberta's economy will continue to prosper at least into the middle years of the next decade. As the world's reserves of easily accessible (and thus reasonably priced) oil and gas begin to disappear (Roberts, 2004), Alberta's remaining deposits of a variety of carbon-based fuels become increasingly valuable. Alberta has more than 80% of the country's reserves of conventional crude oil, over 90% of its natural gas and 100% of its reserves of bitumen and oil-sands (Education Canada, 2003). In 2003, Alberta was the third largest supplier of natural gas in the world. And in 2005, if predictions hold, the province will be producing over one million barrels of crude oil per day from its tar sands, which will account for nearly 70% of total Canadian crude oil and equivalent output (Alberta Economic Development, 2004).

There are, of course, any number of wrinkles that could affect Alberta's continued economic vitality. In the oil patch alone, some economists are saying in 2005 that a major downward correction in oil prices is at hand, while others are suggesting that dramatically rising energy prices around the world could trigger a global recession, as happened during the Iranian revolution in 1979. That said, given current conditions, Alberta appears poised to continue to profit as the world slowly transitions toward renewable energy sources and more sustainable energy practices. The profits will likely draw more workers to the province, and more migrants to the amenities of Alberta's other great natural resource reserves – its mountains, lakes, rivers and natural landscapes

The Sum: Not all Amenities Centres are Alike

Although all four factors in the formula contribute to the explosive growth in the province's amenity hotspots, the look and feel of the growth vary markedly from one community to the next. Canmore, for example, is well on its way to becoming a playground for the ultra-wealthy who like their mountain recreation non-motorized, while Cochrane maintains strong financial ties to Calgary through its cadre of commuting mid-level executives. Growth in the Municipal District of Foothills has been so diverse that it is hard to summarize briefly, but the region remains determined to hang on to its agrarian heritage. In each case, history, topography and existing amenities pre-dispose the community to evolve in distinctive ways. In all cases, though, good information, good planning and good process are critical to shaping a growth trajectory that accommodates change yet protects the attributes that made the community so attractive to so many people in the first place.

Three Alberta Amenity-growth Hotspots

Although Alberta has the fastest-growing population rate in Canada, the growth is far from evenly distributed across the province. Over the past decade, several communities have become particularly attractive to individuals, either as places to move to, or as places to have a second home. Between 1991 and 1996, eight of the top 50 most rapidly growing Canadian census subdivisions were in Alberta, and all of them continued to grow substantially from 1996 to 2001 (Korber, 2004).

We can get a sense of the phenomenon by looking at some figures provided by Statistics Canada. To organize the census, which is taken every 5 years, Statistics Canada divides the country into geographically nested levels, two of which are particularly important to our natural landscapes project. The level closest to a 'community' is a *Census Subdivision* or *CSD*. A CSD is usually any city, town, village or municipal district so designated by provincial legislation. CSDs are nested within larger *Census Divisions* or *CDs*, each of which include multiple cities, towns, villages and

Table 8.1. Population growth 1991 to 2001 in select Alberta census subdivisions.

Census subdivision	% Growth 1991–1996	% Growth 1996–2001	% Growth in CD 1996–2001*	Total population 2001
Airdrie	21.8	32.7	CD 6: 15.9	20,380
Canmore	47.1	29.2	CD15: 10.6	10,075
Cochrane	41.0	58.9	CD 6: 15.9	10,775
Foothills	25.7	22.2	CD 6: 15.9	15,900
Okotoks	26.6	37.1	CD 6: 15.9	10,840
Rocky View	23.2	31.6	CD 6: 15.9	29,030
Strathmore	26.1	38.8	CD 5: 9.28	7,620
Sylvan Lake	23.0	44.7	CD 8: 14.6	6,820
Alberta	9.49	10.3		2,974,007

Note: population growth is broken into 5-year intervals because the boundaries of many of Alberta's Census Divisions and several Census Subdivisions were changed between 1991 and 1996, including Cochrane and Sylvan Lake. Currently, Airdrie, Cochrane, Foothills, Okotoks and Rocky View are all parts of Census District 6; Sylvan Lake is a part of CD 8; and Canmore is a part of CD 15. Source: Korber (2004).

municipal districts. There are 19 CDs in Alberta. Table 8.1 compares the percentage growth of the hotspot communities with the growth of the Census Division of which the community is a part.

The following section provides overviews of the growth and its impacts in three of the Census Subdivisions: Canmore, Cochrane and the Municipal District (MD) of Foothills. The scenery and recreational opportunities afforded by the Rocky Mountains play a major role in the growth of all three communities.

Canmore: from coal mines to amenity gold

In 1979, with little fanfare, the last operating Canmore coal mine closed. The mines had been the heart of the community since its founding in 1883, and many residents who lost their livelihood with the mines' closing also feared the village itself would cease to exist, repeating the history of other small coal-mining hamlets that were once a part of the Bow Valley.

Conditions in the Bow Valley in the 1980s were vastly different from those of earlier decades, however, and dictated a vastly different future. Located just off the TransCanada Highway, an hour west of Calgary and less than 20 min east of Banff, Canmore had been providing a low-cost haven for people seeking the recreational and cultural pleasures of Banff National Park and the town of Banff since the early 1970s. Throughout

the early 1980s, the town became increasingly popular with climbers, skiers and artists. Calgaryans who once rushed past Canmore on their way to Banff began to stop by – and discover they could pick up weekend cabins for a song. Aided and abetted by the growth of the communications and information revolution, the trickle of interest became a flood following the 1988 winter Olympics, which featured Canmore as the cross-country ski venue. By 2004, the old rough-and-ready, down-at-the-heels coal town was well on its way to becoming one of North America's premier mountain-chic communities (Fig. 8.6).

According to Canmore real estate agents, builders and developers who participated in Chinook Institute focus groups (Chinook Institute, 2004), the people who are driving the present real estate boom can be divided into five overlapping segments: wealthy baby boomers over the age of 40; valley workers who are buying their first 'entry-level' homes; investors who are looking for quick cash flow or, more typically, for longer-term speculative returns; 'lifestylers', who are generally Albertans who want to buy a place in the mountains while the opportunity still exists; and second-home buyers, predominantly from Calgary and Edmonton. The buyers are attracted to the active mountain lifestyle, the scenery, and the idea of 'escaping the city'. The town is rapidly gaining the reputation of 'a trendy place to buy, to be and to be seen', which fuels further top-end growth. The town's current



Fig. 8.6. Town of Canmore, Alberta, Canada, with limestone walls behind rising to 3000 m (photograph: L.A.G. Moss, February 1988).

population, including a large 'shadow' population of second-home owners, is now at 12,000, and is expected to double in the next 10 to 12 years.

There are, though, serious constraints to growth. The town lies in a narrow mountain valley characterized by rich river lowlands, narrow, elevated bench lands and precipitous limestone mountain walls rising to 3000 m peaks. Owing to both the topography and the determination of some long-term residents to hang on to what they define as an essential 'mountain village' way of life, the town has been grappling for over a decade with how to balance demands for increased residential and resort development; increased transportation infrastructure through the valley; increased recreational use of the valley floor and bench lands; and the needs of wildlife in an area that biologists say is critical to the safe passage of large mammals through the Rockies. The loss of open space, wildlife habitat, recreational use and affordable housing have become contentious issues and an increasing number of local residents have recently begun grumbling about pedestrian and vehicular congestion during the weekends. A participant in a 2004 development public hearing summed up a general sentiment when she remarked, 'If I wanted to live in a city I would have stayed where I was' (Canmore, July 2004, unpublished testimony).

Cochrane: cowboys and cappuccinos

With the foothills of the Rockies stretching away to the west, Calgary a short 25 min commute to the east and one of North America's premier fly-fishing rivers skirting one edge of town, Cochrane is a textbook example of a natural amenity centre.

Originally founded on the leasehold lands of the historic Cochrane Ranch in the 1880s, the community remained a small agricultural hamlet for decades. In the late 1960s and early 1970s, it began to evolve both economically and socially. A sawmill, a commercial sector and some light industry all began to contribute to the economic growth of the town, three gas plants were established nearby and four gas pipelines were laid, establishing the Cochrane Pipeline Corridor. During the same period, an increasing number of Calgarians began to experiment with Cochrane as a bedroom community, and in the 1990s the town suddenly became the rural metro-adjacent area of choice. The population growth rate was astonishing: 58.9% between 1996 and 2001 alone. While the growth rate slowed in the first years of the new millennium, it was only because development had consumed most of the available land. In September, 2004, with the population at 12,000 individuals, the community annexed an additional 1200 ha and

planners were expecting the pace to pick up again before the end of 2005.

Real estate agents contend that Cochrane is a particularly favoured spot by mid-level executives and double-income professional couples. The big attractions are the ready access to Calgary and its airport, the recreational opportunities provided by both Cochrane proper and the nearby mountains, the town's small-town atmosphere and its carefully guarded pioneer/cowboy heritage and the perception of the community as a comfortable, secure place to raise children. Although relishing the community as a place to live, an increasing number of residents – nearly 50% in 2003 – earn their keep elsewhere, suggesting the town has consolidated its role as a bedroom community for Calgary.

Newcomers will often begin their Cochrane residency by purchasing an entry-level home, move up to a larger house and – when and if it becomes financially possible – find themselves an out-of-town acreage. Of the latter group, it is interesting to note that an unspecified percentage of those acreage owners move back into town within 2 or 3 years, having learned firsthand of the work an acreage requires, and the time it takes to drive their children and themselves in and out of town for educational, social and economic connections.

The Municipal District of Foothills: 'Sooner or later, we're all developers...'

The MD of Foothills is a large rural municipality stretching south from Calgary's city limits for some 80 km. Well used for millennia by a variety of plains-culture aboriginals, in European memory the region is associated with the beginnings of both Alberta's ranching heritage and its oil and gas industry. In total, the District encompasses some 3600 km² of richly diverse landscape, from open prairie and rich farmlands on the east to the foothills of the Rockies on the west.

Blessed with big skies, solitude, vast tracts of open space, sweeping vistas of the not-so-distant Rockies, scenic rivers and quick access to one of Alberta's most popular multi-use recreational areas (Kananaskis Country), Foothills is also immediately adjacent to Calgary, making it

one of the province's top natural amenity hotspots. The amenity growth, though, has been uneven, with very heavy development pressure at the north end of the district and very little at the south end. Further, the development has taken very different forms, from high-density suburban neighbourhoods immediately adjacent to Calgary on the east, to solitary 8 ha rural residencies to the north-west, with small cluster developments sprinkled throughout.

Despite the rising tide of pressure from Calgary for development, Foothills is determined to maintain agriculture as the predominant land use, and its Municipal Development Plan calls for 'proactive steps to manage development'. The region has some of the province's best 'Class I' agricultural lands, and the conversion of those lands to residential use contributes to a growing Canadian problem – the loss of farmland that is dependable for long-term agricultural activity. That said, it is such a standard practice for Foothills farmers and ranchers to sell a small parcel of land in times of need (as recent times have been), that the phrase, 'sooner or later, we're all developers', has become a folk saying of sorts in the area. The greatest, and most contentious, constraint on development is the availability of surface water. Protection of views, known in planning parlance as 'visual resource protection', has been an issue in the past, and will require planning vigilance as development proceeds.

Challenge and Change: the Future Ain't What It Used to Be

As we have seen, amenity migration is not unique to Alberta, to Canada or even to North America. Moreover, the challenges faced by each natural amenity community have their own particular cast. That said, there are some generic challenges in the North American West. For example, in communities that have historically depended on agricultural or resource products as an economic base, the growth has meant coming to terms with the new residents' belief that 'the value of the land is more than a repository of raw materials', and that 'scenic vistas, wildlife and wilderness, to the extent that these features help to draw new migrants and their businesses, are economic assets' (Korber and Rasker, 2001: 2). For other

communities, the rate of growth has 'out-paced the capacity of the community to steer it in a direction consistent with community values, leading to the loss of open spaces and distinct local character – the very amenities that drew people in the first place' (Krober and Rasker, 2001: 2).

The Aspen Institute in Colorado has mapped out a development path that communities typically follow as they move from rural community to full-blown amenity centre (Aspen Institute, 1996). The map is a matrix that tracks 13 different development indices through five different developmental stages. The indices include such elements as 'Economic Base/Jobs', 'Land Use Patterns', and 'Political and Civic Environment', and the developmental stages run from 'Early' to 'Emerging', 'Developing I', 'Developing II', and finally 'Mature'. In all cases, the 'Mature' phase looks much like an urban centre, dominated by urban sensibilities, industrial tourism, trophy homes, national chains, peak seasons with crowded conditions, human and social services overwhelmed by demand and an overall loss and degradation of the area's natural amenities.

That could be the bad news. The good news is that some communities, as they learn about the changes that are befalling them, are working to design and develop publicly supported strategies that allow them to retain a high quality of life even as the pressures for development, change and homogeneity rise around them. Experiments with community visioning, affordable housing, 'green' developments, conservation easements, economic incentives that support open space, recreational zoning and the design of wildlife corridors are encouraging signs that growth and economic development do not have to mean diminishment

of community distinctiveness, amenities, or lifestyle. As Howe *et al.* point out in *Balancing Nature*, 'there is a wide range of policy choices that can help a community preserve its natural areas and open space, support locally owned businesses, encourage traditional vocations, retain vibrant downtowns with a sense of character and tradition and provide ample opportunity for outdoor recreation and other leisure activities' (Howe *et al.*, 1997: 15).

It is beyond the scope of this brief explanation of Alberta's amenities rush to detail either what strategies the profiled amenity 'hotspots' might adopt to deal with the growth and change they confront or what sorts of tools are available to individuals and communities that want to retain open space as a component of their overall quality of life. As a first step toward that continued discussion, however, we will make the claim that it is critical for the residents, planners, elected officials and other decision makers of such communities to:

1. Understand what is driving the change they are experiencing.
2. Understand the value of natural landscape to their communities' social, environmental and economic well-being.
3. Be aggressively pro-active in their planning, using systems-level thinking wherever possible.

Although there are no guarantees, experience suggests that foresight, good planning, good process and the will to act opens the door to growth that can enhance, rather than detract from, the rich natural and cultural character that defines Albertan communities.

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9 Finding a Pad in Paradise: Amenity Migration Effects on Whistler, British Columbia

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Introduction

Amenity migrants seek permanent or part-time residence in areas where they can gain on-going access to higher-quality natural and cultural resources than would normally be available to them in their previous place of residence. Typically, a combination of tangible features (e.g. scenic landscapes, clean air and water, wildlife diversity, geographic formations and recreation opportunities) and intangible attributes (e.g. relative remoteness, community ambiance, cultural richness, quality of life) create the 'pull' needed to stimulate amenity migrants to establish residence in these special places (Price *et al.*, 1999). As with other forms of population migration, amenity migrants create a range of social, economic and environmental impacts in the destinations they frequent (Moss, 1994, 2004; Blackford, 2002). Positive effects include the infusion of new economic (e.g. skills, attitudes, money), institutional (i.e. social, health and education services) and physical infrastructure (e.g. recreation, transportation, housing) capacity into host regions. Negative impacts include unanticipated growth-related stresses on the capacity of local social and health delivery systems, environmental resources (e.g. water, energy, wildlife and protected areas), cultural

and recreation facilities, retailing services and residential housing supply (Williams, 1978; Godde *et al.*, 1999; Rademan, 2003).

The effects of amenity migration on the availability of housing supply for local residents is particularly controversial and apparent in mountain resort destinations where some of the most affluent of amenity migrants congregate. It is here that the specific accommodation needs and purchasing power of amenity migrants create housing prices and accommodation costs that often override normal market conditions. The inflated cost of accommodation is especially significant in destination resort communities as they constrain the ability of regular residents and resort employees to become homeowners or even renters. The implications of this pattern can seriously threaten the normal vibrancy and 'sense of place' associated with many resort community settings, as well as create serious labour attraction and retention problems for businesses operating in these destinations. Addressing the impacts of amenity migrants on resident employee housing supply is a challenge confronting resort destinations across North America.

It is in this context that the following chapter presents a case study of the implications of amenity migration on housing supply and availability in Whistler, British Columbia – one of North America's leading resort communities. Specifically,

it focuses on: (i) describing trends in the growth and magnitude of amenity migration to Whistler; (ii) summarizing the emerging range of economic and social impacts of amenity migrants on Whistler, especially its effects on the supply of employee-oriented affordable housing; (iii) describing the strategies that Whistler organizations are using to address current affordable housing challenges; and (iv) recommending future strategies for addressing these issues. The intent is to generate greater awareness of amenity migration issues as they relate to housing and suggesting ways of addressing this rapidly intensifying challenge.

Whistler and Amenity Migration Impacts

Whistler is a four-season recreation resort community located in the Coast Mountains of British

Columbia, Canada, approximately 120 km from Vancouver along the Sea-to-Sky Highway (Fig. 9.1). The community rests at an elevation of approximately 652 m above sea level with the peaks of Whistler and Blackcomb mountains towering overhead at elevations of 2182 and 2284 m respectively.

Like many western mountain resort towns, Whistler's initial development in the late 1960s and early 1970s was fuelled primarily by its ability to meet the demands of skiers seeking extraordinary mountain terrain and outstanding snow conditions. As its popularity as a skiing destination increased through the 1980s, its developmental activities became inextricably intertwined with the broader demands of being a ski town with its own unique set of social, economic and environmental issues. Over the past decade and a half, the demands of a maturing ski and travel marketplace have driven Whistler to use skiing as a lever to become a more com-

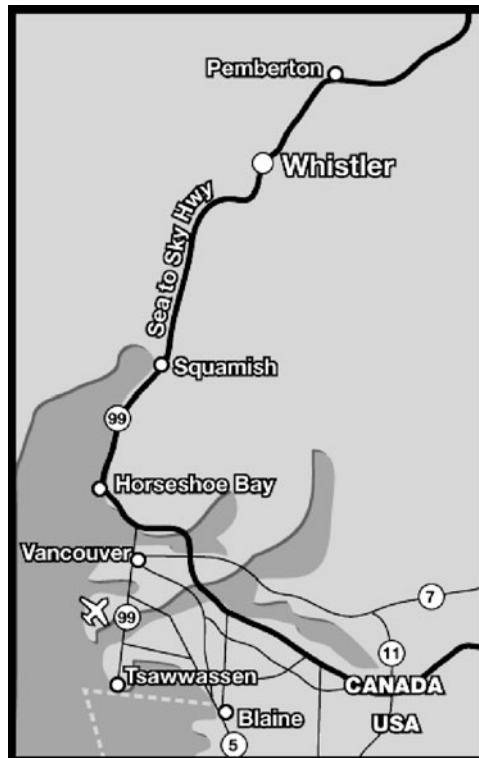


Fig. 9.1. Location of Resort Municipality of Whistler. Cartography: S. Moore, Centre for Tourism Policy and Research (2005).

plex and economically diverse resort community. What began as a collection of guest services for primarily skiers has gradually been transformed into a complex resort town that is rapidly becoming a lifestyle community for a growing number of amenity migrants.

Amenity migration and changing cultures

Post-industrial society values have often led people to seek better lifestyles through migration (Coffin and Lipsey, 1981; Coppack, 1988a,b,c; Galston, 1992; Moss, 1994, 2004; Price *et al.*, 1997). For many of these migrants, improved quality of life is measured in terms of access to specific services and amenities linked to health, education, recreation and the arts (Bell, 1973, cited in Coppack, 1988a).

When the Garibaldi Lift Company opened Whistler for skiing in February 1966, the small mountain town comprised 527 people (RMOW, 2002c). The real estate rush began at that time, as people were immediately attracted to this new recreation amenity and wanted to live in an area where they could have continual access to it – whether living there all season, or building a cabin for frequent ski excursions. After the Province of British Columbia legally incorporated the town as a Resort Municipality in 1975 and the Whistler Resort Association was established, it focused on ‘selling Whistler to the world’ (RMOW, 2002c: 6). Today, with a current permanent population of approximately 10,000, Whistler’s multi-million-dollar economy is almost entirely based on the provision of a broad range of tourism and recreation amenities. However, as with many other North American ski towns (Coleman, 1996; Clifford, 2002; Tolme, 2003), its focus on skiing itself has become less dominant. The traditional winter-based ski-culture of Whistler is gradually giving way to a broader and more urban lifestyle set of values and activities linked to soft adventure, retail service consumption and ‘people-watching’ – where simply being part of the ‘Whistler Experience’ is valued (Fig. 9.2). As defined by the RMOW (2002c: 9):

The (Whistler) Experience is the ease with which we jump on our skis or boards or bike, grab our

clubs or racquet or swimsuit, lace up our boots or blades and go. Or not go, but sit back and order another *latte*. It’s in the nature of the Village, in the funkiness of Creekside, and in the rugged mountain terrain everywhere else. It’s the synergy of the people.

Walking through the main village of Whistler, one can witness this phenomenon firsthand as the designer boutiques, brand-name shopping outlets, specialty shops, upscale restaurants with award-winning chefs and urban café icons are filled with patrons at all hours of the day. In combination, the seasonal surges in waves of domestic and international visitor, and the more recent escalation in amenity-seeking migrants are displacing the original culture of this once small-town mountain ski community. Through their purchasing power, they have gradually ‘gentrified’ Whistler, by pushing the costs of residing in the community beyond the affordability of the original residents and service-oriented employees. In the process, they are displacing previous inhabitants to nearby down- and up-valley communities, such as Squamish and Pemberton. The result of the gentrification of mountain resorts is a deeply eroded community where the growing income disparity is becoming more apparent, creating a place of haves-versus-have-nots (Clifford, 2002; Moss, Chapter 1, this volume). With their continuing succession into the mainstream of Whistler’s development, amenity migrants are gradually reshaping the community’s culture and sense of place.

Amenity migration and population homogeneity

Whistler’s visioning processes in the late 1990s identified building a stronger community as a key to the destination’s long-term sustainability (RMOW, 2002c). Having a stable resident workforce living within the community was considered essential to conserving the innate integrity and vibrancy of the destination (RMOW, 2001, 2002a,c). However, the growing displacement of resident employees by more affluent amenity migrants is increasingly skewing the socio-economic profile of the community. Approximately 27% of all Whistler employees lived outside of Whistler during the 2002/2003 winter season, up from

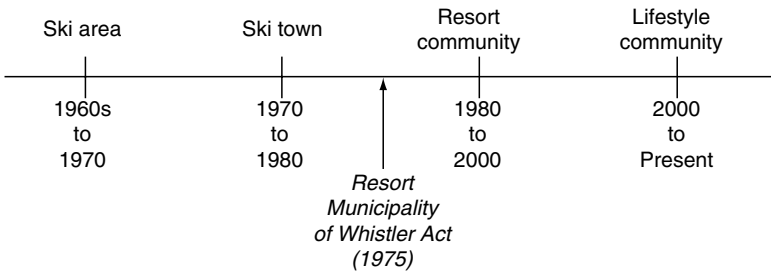


Fig. 9.2. Whistler evolution diagram.

25% in 2001/2002, and 23% in 2000/2001. Regardless of whether these employees were pushed out of Whistler by amenity-migrant-inflated housing prices and property taxes, or due to personal decisions to live in less commercialized and smaller communities, the growing proportion of the destination's employees living in Pemberton (30 km north) or Squamish (50 km south) is a clear indicator of Whistler's failure to address the needs of less-affluent workers in the destination. Increasingly, Whistler is becoming a community composed of very affluent amenity migrants – at the expense of less-wealthy citizens, who are gradually being displaced (Horne, 2003).

Amenity migration and destination accessibility

Limited physical access has been a traditional barrier to mountain community gentrification and homogenization (Clifford, 2002; Moss, Chapter 1, this volume). However, new technologies, such as cellular phone access and high-speed internet connection, are changing the friction of distance and the relative remoteness of mountain communities for amenity migrants (Stewart, 2000). Whether advances in technology lead or follow amenity migration, researchers agree that the introduction of these mediums is stimulating population shifts to amenity-laden locations (Moss, 1994, 2004). In this context, a rapidly expanding group of self-employed individuals are able to live and work in Whistler because advanced telecommunications technologies available in the community enable them to keep contact with their customers in more-distant urban locations (Gill,

2001). Through these improved technologies, they are able to enjoy valued amenities available in the area while maintaining business options elsewhere. Improved accessibility by road, air and/or rail greatly contributes to the growing amenity migration phenomenon (Price *et al.*, 1997; Glorioso, 1999; Rudzitis, 1999; Stewart, 2000; Gill, 2001; Lichtman, 2001). A wide variety of bus, taxi, limousine, helicopter, car rental and (formerly) rail transportation services currently perform important roles in enabling Whistler-based amenity migrants to do business in the mountains and quickly connect to Greater Vancouver when required. Quick and easy accessibility is also important to more intermittent amenity migrants, typically shuttling between Whistler and nearby metropolitan areas such as Vancouver and Seattle. New transportation investments in the Sea-to-Sky Highway Corridor to improve Whistler's access for the 2010 Winter Olympics will provide additional incentives for more amenity migrants to establish residences in Whistler.

Amenity migration and quality resource access

In some destinations, amenity migration leads to reductions in public access to valued natural resources (Price *et al.*, 1997). This is especially the case when wealthy amenity migrants create substantial estate developments and associated 'trophy homes' that dominate landscapes and in certain situations constrain or block access to traditional community areas. For instance, despite considerable efforts within Whistler to retain green and protected spaces, the lure of lucrative

housing development projects with associated community amenity bonuses has resulted in several areas being shifted from natural to more intensive and urbanized uses.

In addition, unintended and adverse social effects may accompany such intensified levels of expensive development. In Whistler's case, crime rates have been increasing significantly. The number of reported statute offences experienced a 290% increase between 1996 and 2002. The per capita rate of criminal code offences in Whistler in 2001 was more than twice the province of British Columbia's average (RMOW, 2001). While these statistics fail to filter out the effect of tourist traffic (e.g. greater than 20,000 visitors on peak days), they do reflect the types of stresses that rapid and unanticipated amenity migration growth can place on small mountain communities (Siembieda, 2003). Without considerable forethought in planning and management, as well as a clear recognition concerning what attracted people to such areas in the first place, destinations such as Whistler can be transformed into urbanized settings with a changed sense of place (Rudzitis, 1993; Beck, 1995).

The housing challenge

Amenity migration and housing price escalations

Whistler's popularity as a destination for amenity migrants is expressed in their growing willingness to purchase primary and secondary residences of various types, for varying periods of time, under diverse ownership schemes and at ever-increasing prices (Table 9.1).

Motivated by a desire to own a *little piece of paradise*, amenity migrants have driven the average prices of chalets (detached single-family homes), condominiums and duplexes steadily upward. The average price of a chalet in 2004 increased six times from its cost in 1994. During the same period, the cost of condominiums almost quadrupled (Global Frameworks and Terra Housing, 2004). These increases have been especially pronounced more recently. For example, the average cost of chalets increased 67% from CAN\$813,222 in 1999 to CAN\$1,353,864 in 2003. Similarly, the average cost of condominiums escalated 119% from CAN\$335,511 in 1999 to CAN\$738,011 in 2003. Table 9.2 illustrates the number and type of housing units sold during this period. It also reveals that housing unit sales peaked in 2002.

The decrease in sales in 2003 has been attributed to a general lack of lands available for development as the community approaches its 'build-out' limit. This development limit is dictated by a long-established growth ceiling that is based on a maximum bed-unit capacity that is incorporated into the Resort Municipality of Whistler's Official Community Plan (RMOW, 2002b). In 2001, approximately 86% of the developable bed-unit capacity had been created (WHA, 2004). Assuming that a significant top-up to the bed-unit ceiling does not occur, and that a projected 3% annual growth rate in bed-unit supply occurs, it is anticipated that complete bed-unit build-out at Whistler will occur in 2005. At that time, the community is anticipated to have a total population of 11,216 residents. It is also projected that a growing number of these residents will be affluent amenity migrants seeking access to the scarce supply of available housing. Because of their presence and the scarce supply

Table 9.1. Real estate prices in Whistler by real estate type, 1999–2003 (CAN\$).

Year	Chalet	Condominium	Vacant Land	Shared Owner	Duplex
1999	\$813,222	\$335,511	\$375,045	\$203,040	\$423,518
2000	\$980,851	\$423,308	\$682,065	\$194,469	\$464,123
2001	\$966,796	\$455,809	\$1,179,423	\$147,968	\$569,423
2002	\$1,256,423	\$538,569	\$1,077,528	\$157,660	\$644,955
2003	\$1,353,864	\$738,011	\$1,078,545	\$179,634	\$901,992

Source: Whistler Listings, RE/MAX of Whistler (2004).

Table 9.2. Number of real estate transactions in Whistler by type, 1999–2003.

Year	Chalet	Condominium	Vacant land	Shared owner	Duplex
1999	139	495	47	82	17
2000	175	647	46	81	21
2001	124	661	27	37	26
2002	139	985	54	95	22
2003	93	537	11	73	13

Source: Whistler Listings, RE/MAX of Whistler (2004)

of residential accommodation, it is expected that housing prices in the destination will climb even more dramatically. This trend is already apparent as developers at Whistler and the Resort Municipality eagerly attempt to ‘cash in’ on the last few high-priced development opportunities, and long-term local citizens continue to ‘cash out’ of their highly inflated residential properties.

Amenity migrants as second-home owners

It is not unusual for people to eventually buy a home in an area that they have visited and enjoyed repeatedly as a visitor (Stewart, 2000). Figure 9.3 describes the typical evolution from tourist to amenity migrant from a housing perspective.

Amenity migrants make up a significant proportion of total homeowners, but dominate the ownership of second homes (Gill, 2001). In

1999, an estimated 90% of registered property owners at Whistler were from the province of British Columbia, but less than a quarter of them were actually full-time residents of Whistler (WHA, 2004). This pattern continued through 2003, when 72% of all properties were registered by owners who lived outside of Whistler (WHA, 2004). This was attributed to a growing awareness of Whistler as a ‘world-class’ resort and a variety of favourable international investment conditions. This trend towards greater international ownership of second homes at Whistler is not likely to abate soon, largely because of the anticipated global market exposure that the community will receive through its hosting of the 2010 Olympic Winter Games.

Whistler’s amenity migrants essentially purchase one of two housing types: covenanted rental properties and various forms of sole proprietorship residences with non-compulsory

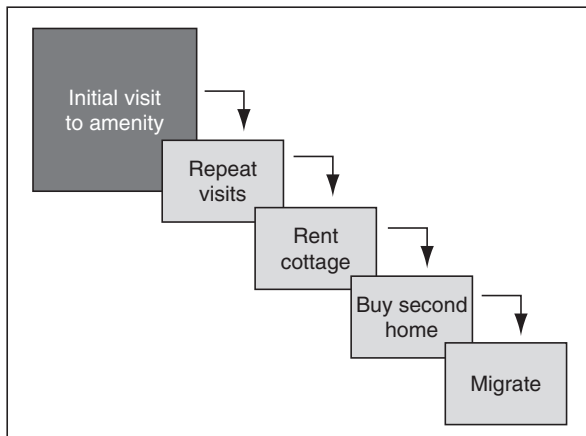


Fig. 9.3. Evolutionary process: from tourist to amenity migrant. Adapted from Stewart (2002).

rental requirements. Many of the second-home residences purchased by amenity migrants in Whistler have required rental covenants registered on the property title. These covenants require second homeowners to make the residences available for use by other renters for specific periods of the year. However, there are no data available on the proportion of second homeowners who actually rent out their properties. Information concerning the occupancy levels and tenant use of amenity-migrant-owned non-covenanted chalets (detached single-family homes) and duplexes in Whistler is also unknown. Availability of such information would help to determine amenity migration's effects on the supply of housing for other resident groups in the destination.

Affordable housing challenge

One of the most challenging and significant aspects of the amenity migration trend has been its role in escalating local real estate prices and subsequently intensifying the scarcity of affordable housing for Whistler's service-oriented labour force. With the demand for affordable real estate far outpacing available affordable housing supply, the municipality is faced with the challenge of accommodating its labour-intensive workforce within the community's boundaries. Given the substantial and on-going contributions that this workforce makes to the social and economic fabric of the area, retaining a stable-resident workforce within its boundaries is considered essential to the long-term success of Whistler as a vibrant resort community (RMOW, 2001, 2002a,b).

Recent concerns about the lack of affordable housing have extended to retirees who have lived and worked in Whistler for years. Many of these seniors have been forced to cash out the equity in their home and relocate to larger urban centres where they can find affordable housing and acquire living assistance or health services not offered in Whistler (Taylor, 2003; Ashton-Haiste, 2004). As current seniors in Whistler continue to age, the concern of losing older and valuable community members due to the rising housing costs and limited health services is expected to escalate. The Resort Municipality of Whistler (RMOW, 2003) propose that in light of the forth-

coming 2010 Winter Paralympic Games in Whistler, the community may be 'well-placed' to address the housing and health service needs of its seniors in a more proactive fashion.

Not only does amenity migration tend to price certain housing stock out of the reach of many destination residents and employees, but it also stimulates housing stock leakages. Leakage in this context refers to the loss of market-housing stock that would normally be available to accommodate Whistler workers through rental and lease agreements. Leakage induced by amenity migration occurs under two sets of circumstances: (i) when existing accommodation owners no longer rent their suites or duplex units to employees because the rental prices attainable are no longer commensurate with the increased value of the accommodation units caused by amenity migrant demand; and (ii) when amenity migrants purchase existing employee accommodation units and are not interested in renting out their space to community workers (Whistler Question, 2004). In either case, exorbitant housing prices generated by amenity migrants dampen the desire of proprietors to provide much needed housing space for employees – thereby accelerating the loss of employee housing options in the destination. This situation conflicts with the intent of the Municipality's Official Community Plan, which seeks to deliver a supply of '...affordable housing that will enable those who work in Whistler to live in Whistler' (RMOW, 2002b: Section 4.2: 13).

Affordable housing and employment challenges

Concurrent with amenity migrants settling in an area, there is often a demand for different services and a full range of new jobs to be generated (Rudzitis, 1993; Price *et al.*, 1997). Businesses and services associated with supporting amenity lifestyles emerge (e.g. health, education, communications, finance, culture, housekeeping, gardening, etc.), along with a demand for higher-quality traditional services (e.g. recreation, accommodation, transportation, hospitality). Meeting the facility and labour requirements of this demand can be problematic for resort destinations.

Whistler has attempted to address the facility component of this demand by creating a

broad range of high-quality public- and private-sector amenity developments (e.g. cultural and community centres, medical centres, libraries, museums, spas, specialty retailing facilities, etc.). However, the destination has been challenged to supply the needed labour to operate these new facilities as well as its ongoing set of traditional service ventures. In 2002/2003, 10% of the destination employers were not able to achieve full staffing levels during the winter season (WHA, 2003). As the price of housing increases, so does the spectrum of employees who are unable to find adequate, affordable housing. What was once a problem mainly for seasonal or low-wage service-industry workers now extends up to a diverse set of middle- and above average-income wage earners. Many of Whistler's new services require non-stereotypical service workers such as artists, health care professionals, teachers, librarians and entrepreneurs, who themselves demand quality working and living conditions. Moss (1994, 1999, Chapter 1, this volume) and Glorioso (1999) refer to people among these who are not primarily motivated by amenities as 'economic migrants'. However many of these workers may have also chosen to work in Whistler because of the region's unique set of amenities. While no empirical research exists that formally confirms the existence of linkages between workplace and amenities at Whistler, informal discussions with employees suggest that access to the area's outstanding environmental amenities are important in retaining employees in the community's workforce. Currently, a lack of affordable housing for these workers contributes significantly to the employee shortage challenge, as these potentially valuable migrants require appropriate shelter for themselves and their families.

Not being able to attract and retain qualified service positions creates a range of direct and indirect economic costs for the employer and community. Staff turnover costs created by unacceptable accommodation circumstances can be exorbitant and disruptive for business operators, particularly when these positions are at the professional level. Similarly, a lack of affordable employee housing can lead to a dissatisfied and uncommitted workforce that presents itself in a negative manner to clients and the broader resort community.

Pushing the solution to affordable housing for employees 'down-valley' is not a long-term answer to the employment challenge. Like wealthier amenity migrants, there is a sense that the majority of Whistler's workers chose to situate themselves in the resort destination so they could enjoy its amenities. Forcing them into lengthy, expensive and sometimes treacherous commutes to work and away from Whistler's amenities takes away the very reasons why they opted to seek employment in Whistler from the outset. Unfortunately, this reduction in the quality of life of displaced employees can be projected on to the resort's visitors and amenity migrants, who are often perceived to be the cause of the affordable housing issue. Because of the inextricable interdependence between content employees and high-quality service in resort destinations, it is critical that every employee be predisposed to making the client's experience exceptionally positive. Ensuring that Whistler's employees have a strong and positive appreciation of Whistler's 'sense of place' can be best nurtured by supplying affordable housing within the community's boundaries.

Strategies for Addressing Affordable Housing Needs

Resort Municipality of Whistler strategies

As the Resort Municipality of Whistler (RMOW) reaches its planned build-out ceiling, its focus is shifting from managing growth to planning for long-term sustainability. It has stated that providing 'affordable housing for the resident population is a key to establishing a sustainable path to the future' (RMOW, 2002a: 52). This is further emphasized in Whistler's Official Community Plan (OCP) (RMOW, 2002b), which identifies the need to supply affordable, suitable housing for those working in the resort municipality. This recommendation is supported by a number of bylaws, zoning amendments and policies to ensure that the strategy is legally binding. The OCP, in combination with the Comprehensive Development Plan and the Comprehensive Sustainability Plan, serve to guide Whistler development towards a more sustainable path.

A major tool for helping develop affordable housing is a works and service charge that has been applied to all new commercial, industrial and visitor accommodation development since 1996 (RMOW, 1996). Fees collected via this charge have been captured in a fund that is used to leverage money for the construction of affordable employee-restricted housing (Fig. 9.4). Since 1997, the allocation of these funds has been managed by the Whistler Housing Authority (WHA), which has a mandate to oversee development, administration and management of employee-restricted housing in Whistler. In the early 1990s, due to an unprecedented demand for employee housing, the RMOW instituted a lottery system to determine who would receive opportunities to purchase resident-restricted housing. However, in 1998 due to the extensive number of applicants, the WHA replaced the housing lottery with a waitlist system.

In its ensuing assessment of employee-restricted housing needs, the WHA determined it needed to house one-third of Whistler's workforce within the municipality's boundaries. By 2002, the WHA had facilitated the creation of 3850 employee bed units (WHA, 2003). This represented approximately 26% of the winter-season bed unit needs in 2002/2003. In addition, another 450 bed-units were planned and zoned for construction at various locations in the community (e.g. Spring Creek, the Park Georgia Hyatt Hotel and the Blackcomb Staff Housing Building 8). It was anticipated that by the time of Whistler's full build-out in 2005, these additions would bring the total employee bed-unit count to a targeted 4300 or 25% of the community's total peak winter workforce requirements. In addition, a Canada Mortgage and Housing Corporation (CMHC) rental subsidy programme was established for a housing project called Whistler Creek Court in 1984. This successful but limited initiative provides up to 25% rental subsidy to renters, depending on their income level.

Despite these significant accomplishments, the WHA continues to face critical challenges. For instance, although the WHA was able to house 26% of Whistler employees in affordable housing units during 2002/2003, an increasing proportion of employees are being accommodated beyond Whistler's boundaries because existing affordable housing prices are still beyond the reach of many employees. In addition, the

funds needed to preserve resident-restricted housing are expected to increase due to escalating costs of property maintenance and management in WHA-owned rental units (Wake, 2003).

Without additional and continued funding, the WHA will have to develop more creative strategies to overcome the power of ever-increasing market values. One of the more innovative approaches to expanding the supply of affordable housing was advanced in 2003. In particular, the RMOW planning department introduced a Zoning Amendment Bylaw (Employee Housing Initiatives) No. 1621, 2003. It was developed in order to encourage the construction of employee housing within existing neighbourhoods. This bylaw promotes density 'bonusing', detached garages with suites, detached suites and increases in allowable rental suite sizes.

While the intentions of the OCP and the efforts of the WHA are admirable and have resulted in the provision of a number of affordable housing they may be 'too little too late'. Upon completion of the Creekside development in 2005, Whistler will have reached its established bed-unit capacity limit, potentially closing the possibility of any further large-scale developments (WHA, 2004). Unless extensions beyond this bed-unit limit are permitted and/or further land tracts are opened for development, this means that future funding for Whistler's affordable housing fund will be discontinued.

Despite this possibility, the destination's need for affordable housing continues to grow and will be exacerbated by the 2010 Winter Olympic Games initiative. Development, promotion, delivery and management activities associated with this hallmark event will most surely accelerate the need for more affordable housing in Whistler. Between 2003 and 2004, the WHA experienced a 60% increase in the number of qualified purchasers on the waitlist for employee housing units (Taylor, 2004). Unfortunately, the changes to the 2003 zoning by-law amendments, as part of the Employee Housing Initiatives, only encourage small-scale residential developers or existing homeowners to include an employee-restricted housing unit on their property. However, there is no penalty for not doing so, nor any reward for satisfying the by-law requirements, thereby diminishing its potential contribution to solving the housing challenge.



Fig. 9.4. Residences built through the 'restricted ownership' programme of the housing agency of Whistler, BC, Canada, and purchased by owner-occupants employed in the town (photograph: courtesy of Whistler Housing Authority, September 2002).

Furthermore, the existence of the secondary suite by-law does not guarantee additional housing will be made available. In some cases, these units remain empty or are used as storage facilities because there is currently no law enforcing owners to rent the accommodation (WHA, Whistler, 2004, personal communication). Though these efforts may encourage the development of a handful of affordable bed units over time, the contribution is likely to be minimal relative to the current increasing scarcity of affordable housing. Any units that are built will be subject to the market-driven pricing, which will probably be heightened by 2010 Winter Games demands.

Local business strategies

According to the 2002/2003 *Whistler Housing Needs Assessment Survey* (WHA, 2003), employers (as in previous surveys) cited the unavailability of affordable housing as the main reason for employee shortages in Whistler. Yet, in the 2002/2003 winter season, only 28% of employers assisted their employees in some way in acquiring

housing (e.g. providing referrals to landlords/realtors; informing employees of availability; engaging in word of mouth networking in the community) and only 29% of large businesses and 22% of small employers actually provided some type of housing. This level of contribution was slightly less than in previous years.

At least part of the discrepancy seen between employee shortages and the willingness of businesses to provide their staff with some sort of housing may be attributed to a pervasive corporate attitude that suggests that the RMOW, as opposed to business, should be responsible for providing affordable housing support. Currently, no direct RMOW incentives or regulations exist to encourage businesses to provide employee housing. Despite this situation, a survey of 266 employers indicated that 58% of them were willing to lease, on average, four units for their employees (WHA, 2003). If their words were to be translated into action, such an initiative would significantly reduce the shortage of affordable employee-oriented housing in the resort community. However, turning this corporate opportunity into a reality will require multi-stakeholder collaborations between employ-

ees, developers, businesses, the WHA and the RMOW. It is yet to occur, but recognition of the need is apparent amongst all stakeholder groups.

Conclusions and Recommendations

Whistler is rapidly becoming a lifestyle community with an increasing number of affluent amenity migrants. The basis for this increase in migration includes: (i) changed lifestyle motivations; (ii) escalated and concentrated wealth investment focusing on second-home ownership; (iii) improved business and communication technologies; (iv) increased transportation access to markets; and (v) enhanced awareness of Whistler's high-quality amenities. Together, these factors have laid the foundation for Whistler's unprecedented past and probable future levels of amenity migration growth.

Fuelled by the expected momentum and promotion of the 2010 Winter Paralympic Games, the housing demands of both wealthier amenity migrants and other residents are expected to intensify. As a result, the Resort Municipality of Whistler and the WHA face new challenges in implementing a housing plan that 'will suit the diverse and evolving needs of (the) burgeoning community' (WHA, 2002: 7). The RMOW and the WHA will have to develop alternative partnerships and revise their strategies to create sufficient levels of employee housing within

the municipality's boundaries. As the affordable housing challenge intensifies, an important component of resolving the issue must focus on local public-private partnerships. The future success of the community and its businesses depends at least partially on a higher degree of corporate involvement in providing housing solutions. Accurate forecasts of Whistler's changing housing requirements will be needed to determine the quantity and quality of housing needed, as well as to help shape the strategy needed to supply and manage future housing requirements.

A critical part of the solution to the housing issue will need to address the interrelationship between amenity migration trends and their influence on affordable housing and service needs in the community. In particular, there is a need to more clearly define the types of amenity migrants who are choosing to purchase properties in Whistler and establish the type and magnitude of service needs that they will require. Such information translates into economic opportunities, employment requirements and housing needs. Through greater local public-private partnerships, these needs are likely to be addressed more efficiently and effectively. In addition, knowing more about amenity migrant behaviour and their lifestyle expectations can help the community develop strategies for sustaining those cultural and natural attributes important to both amenity migrants and other community residents.

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10 Cultural Survival and Environmental Degradation in the Mountains of the Secwepemc

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Introduction

Amenity migration, and more generally immigration, is a contemporary force critically impacting the Secwepemc people and lands. To comprehend its effects one must understand the unique relationship between the Secwepemc (also known as the Shuswap people) and our traditional lands and resources, the history of contact with European settlers and aboriginal land ownership and jurisdictional issues in British Columbia (BC). Since early contact with European settlers, the Secwepemc lands and culture have experienced devastating effects from in-migration of various forms.

One of the earliest examples of this happened between the years 1850 and 1903, when a series of epidemics were responsible for reducing Secwepemc populations by nearly 70% in just two generations and even extinguishing some communities altogether. Out of 30 original bands in the Secwepemc Nation, only 17 survived (Coffey *et al.*, 1990).

The onslaught of 'development' began in the mid-1800s with the arrival of Catholic Church missionaries, and grew with the fur traders, miners, loggers, land speculators, ranchers, tourists and amenity settlers. Today, amenity-motivated enterprise and settlers are focused on Secwepemc lands, littering the mountains with insensitive, large-scale residential, commercial, industrial and

recreational developments. Despite the settlers' insensitivity to the negative effects of the developments, the Secwepemc are striving to uphold our deep symbiotic relationship and responsibility to the land. In consideration of this special relationship and responsibility, the negative effects of in-migration have far greater impact on the Secwepemc than on most non-Secwepemc, because the Secwepemc are elementally reliant on the land for maintaining our distinct Secwepemc identity, culture and livelihood. Any harmful development to the land directly affects the entire Secwepemc way of life. However, the outcome is larger because there is also a direct relationship between the loss of Secwepemc culture, the loss of biodiversity and the longer-term health and integrity of *all* inhabitants of Secwepemc territory.

Although the phenomenon of amenity migration (AM) is apparent throughout the traditional territory of the Secwepemc, this study focuses on its effects in the area known to the Secwepemc as Skwelkwekwelt. It is one of the last remaining, yet endangered alpine mountain ecosystems in Secwepemc territory. Its biodiversity is being severely degraded, and this plays a critical role in the deterioration of the cultural fabric of the Secwepemc. This chapter describes Skwelkwekwelt's amenity migration, and its direct and indirect effects on the Secwepemc, as well as outlining what can be done to address its harmful impacts.

Land of the Secwepemc

The Secwepemc are the indigenous peoples whose traditional territory spans the south-central interior plateau of British Columbia, Canada. Secwepemc traditional territory extends from the Columbia River Valley on the east slope of the Rocky Mountains to the Fraser River on the west, and from the upper Fraser River in the north to the Arrow Lakes in the south. It is a vast area of approximately 180,000 km². A variety of landscapes in the mountain regions are particularly important to the survival and vitality of the Secwepemc. The landscape zones used by the Secwepemc include alpine, montane parklands, montane forests, intermediate grasslands, intermediate lakes, river terraces, floodplains and river valleys (Adams Lake and Neskonlith Secwepemc, 1999). The subsistence economy of the Secwepemc relies upon continued access to the great diversity of the varying ecological landscapes throughout this large area.

The Secwepemc were, and to a considerable extent are still, semi-nomadic, travelling considerable distances to fish, hunt and gather plants. Many plants are still harvested today for foods and medicines, and along with deer, moose, elk, caribou, many smaller mammals and several varieties of salmon and other fish, play an important role in sustaining the Secwepemc culture and economy. The Secwepemc traditionally harvested over 135 species of plants for foods, medicines, ceremonial purposes, habitation and technology (Palmer, 1975).

Skwelkwekwelt

Skwelkwekwelt is the place name given in the Secwepemc language (Secwepemcstin) that translates to 'high alpine mountains' in the English language and has been considered one of the closest, most accessible and significant hunting and gathering areas for the Secwepemc. Before Sun Peaks Resort (SPR) built ski trails and lifts on these mountains, the Secwepemc would traditionally harvest up to ten moose at a time and preserve the meat by smoking and drying in the seasonal hunting camps that were set up in this area. In addition to hunting and gathering, these pristine high mountains are considered by the

Secwepemc to be very sacred locations, where spiritual journeys such as vision quests are practised. Through fasting and praying in the vision quest, the Secwepemc maintain a connection with the spirits of their ancestors and the natural environment.

The traditional resources of Skwelkwekwelt continue to be used regularly to gather an entire winter's supply of food for many Secwepemc families, a large number of whom survive on low incomes and use game and other nutrient-rich wild foods to supplement their diets. Secwepemc Elder, Dr Mary Thomas, has identified numerous varieties of berries and many other plants harvested as foods and medicines. Two of which are culturally quite important roots gathered as a source of carbohydrates: avalanche lily and wild potato. While this source is being severely threatened by mass tourism, in-migration and unsustainable forestry practices, plants and animals in the outlying areas surrounding the SPR are still important food sources for the Secwepemc.

Sun Peaks Resort (SPR)

The SPR includes three ski mountains which have been developed to date and are known as Tod Mountain, Sundance Mountain and Mt Morrissey. It is interesting to note that oral histories state that Tod Mountain (the highest peak in this area at 2152 m) was named after a fur trader, John Tod, who distributed smallpox-infected blankets to the Secwepemc, which spread to epidemic proportions and almost led to the extinction of the Secwepemc. SPR was first developed in the early 1960s as a small resort with only a few lifts and trails, which did not greatly impact the Secwepemc way of life. Hunters, fishermen and traditional plant harvesters were still able to use the surrounding lands for economic, cultural and spiritual purposes.

In 1992, the SPR was purchased by M. Ohkubo of Nippon Cable Company Ltd, Japan, who proceeded with a master plan to dramatically expand the size and operations of the resort under the auspices of the Sun Peaks Resort Corporation (SPRC). To date, over CAN\$200 million have been spent on the expansion, which includes construction of the Delta Hotel and Conference Centre, development of trails and

lifts on Mt Morrissey, completion of an 18-hole golf course and massive development of municipality-scale residential subdivisions. The present facilities include (Sun Peaks Resort Corporation, 2004):

- 3678 acres of ski terrain
- 116 named ski trails
- 40 km of Nordic ski trails
- back country Cat and Hummer tours and helicopter skiing
- 25 boutiques, restaurants, bars, cafes and hotels
- seven on-mountain hotels with some 4500-beds tourist accommodation and rental homes

The Sun Peaks Master Plan for future expansion includes:

- development of two more ski mountains (in addition to the existing three)
- mountain-top restaurants
- creation of 24,178 bed units
- creation of year-round resort (expanding into Secwepemc outlying continued-use areas)
- proposed expansion of residential development toward MacGillvray Lake (8 km from Sun Peaks)

Who are the Amenity Migrants?

Great numbers of amenity and other associated migrants are moving into the sensitive mountain ecosystems of Skwel'kwel'kwelt as a result of the Sun Peaks development. Of the approximately 2000 homeowners with fee simple interests in property at Sun Peaks (Ramsey, 2003), about 300 are presently considered permanent, year-round residents (Bergen, 2003). Generally speaking, permanent residents own the lower-priced homes, with other property out of the price range of average local purchasers. Condominium flats sell for between CAN\$330,000 and CAN\$485,000 (Hooper, 2004). The SPRC real estate marketing strategy focuses on attracting the wealthy from the USA (particularly Washington, Oregon and California); the Lower Mainland of BC; and Australia (Evans, 2004). Many of the residents are high-income foreigners who migrate seasonally to their chalet or condominium in Sun Peaks.

Following Moss's typology of amenity migrants (Moss, 1994, 2004), the majority of

these in-migrants to Sun Peaks are not permanent, but are seasonal and intermittent amenity migrants who are typically in residence for the ski season, and in the summer, for golf and other recreational activities. In an interview with Radio Netherlands on June 25, 2003, a Sun Peaks spokesperson, Chris Rogers, stated that 'there are about 300 people that live there year round and at different parts of the recreational city we'll have as many as four or five thousand guests in the village' (Bergen, 2003). With the increase in population numbers, there is increased competition for the natural resources that the Secwepemc have relied upon for sustenance for thousands of years. These in-migrants are unable to fully appreciate the traditional cultural activities and the ecological integrity and sensitivity of Skwel'kwel'kwelt. Most of them are white, middle-to upper-income urbanites, with vastly different values and belief systems from the Secwepemc.

SPRC is aggressively promoting the present high number of incomers flooding the area by developing the resort into a year-round destination. Winter activities include downhill skiing, cross-country skiing, snowboarding, snowmobiling, helicopter skiing, all-terrain vehicle (ATV) tours and dog sled runs. In addition to winter activities, the SPRC plans include attracting tourists and residents by hosting spectacles such as music festivals, wildflower festivals and sporting events in the spring and summer. It has increased spring, summer and fall promotion for hiking, fishing, mountain biking, ATV riding, hang-gliding and horseback riding activities. Sun Peaks recorded 300,000 skiers in its 2003 season (December to mid-March) and the August 7, 2003 edition of the *Vancouver Sun Newspaper* stated that the SPR Annual Canadian Mountain Bike Competition draws 2000 visitors (Ramsey, 2003).

While the Sun Peaks expansion project fails to offer any meaningful economic opportunities for the Secwepemc, its extensive development attracts, along with amenity migrants, those who follow for primarily economic reasons. Accommodation, other commercial enterprises and related infrastructure employ construction workers and various hospitality workers. Administrative-related employment includes clerical work and real estate sales, while socially related occupations are largely limited to day care work, some medical services, etc. Labourers

are hired to operate ski lifts, make snow and maintain golf courses and trails.

Impacts of the Amenity Migrants

Recognizing the direct relationship between ecological and cultural sustainability, it is quite apparent that the growing phenomenon of amenity migration in Skwelkwewelt is placing greater pressure not only on the sustainability of the biological diversity, but also on the cultural and political-economic fabric of the Secwepemc. These impacts of Sun Peaks' amenity residents, and associated economic migrants, tourists and other visitors, have complex implications for the lives of both the Secwepemc and local non-Secwepemc alike. Awareness of and sensitivity to the interconnectedness of the cultural, economic, environmental and legal impacts of amenity migration in an ecological context is vital to maintaining the uniqueness and beauty of the Secwepemc culture, and natural and social harmony for the benefit and integrity of all humans.

Cultural degradation

Imperial expansion and colonization are key factors influencing the near extinction of Secwepemc culture. As an earth-based culture, massive land developments such as the SPR cause irreparable loss of Secwepemc land traditions. Ecosystem destruction and exclusion of the Secwepemc from land- and resource-use planning and management creates a high risk of loss of the sophisticated Secwepemc traditional ecological and historical knowledge system, including language, spirituality, values, beliefs, customs and laws, along with socio-political and economic structures.

Like many other indigenous peoples, the Secwepemc way of life is based on the spiritual beliefs and conservation ethics which reflect the perception of humans as a part of a wider community of life. We believe that everything – animals, plants, rocks, fire, air and water – has a soul, which is inherited from the remains of people who once lived during the mythological age. Everything in the natural world can speak and provide important messages to us. These beliefs

promote awe, respect and care for nature (Stevens, 1997).

The Secwepemc also believe that language is given by the Creator to communicate our unique perspectives, values and beliefs to people and to the natural world. Values of respect, reciprocity, gratitude, interdependency and cooperative relationships are expressed through prayers and offerings in the Secwepemc language. Prayers of respect and thankfulness to all of creation are offered before anything is harvested from the land. In return, the Secwepemc receive messages from the animals and birds, who tell us when it is time to harvest and gather certain foods and medicines. The cricket communicates when it is time to begin catching salmon. The plants also communicate messages to the Secwepemc. When the wild strawberry plant blooms, the people know a certain type of fish is ready to be caught.

The Secwepemc maintain a vast storehouse of traditional ecological knowledge (TEK), accumulated over years of experience and observations on the land. It was obtained through our relationship to, and direct participation in, the natural world. Secwepemtsin (Secwepemc language) is a 'living language', because it provides a cultural context for communicating the teachings of a people's cultural values, beliefs, rituals, songs, stories, socio-political structures and spirituality. And this knowledge, beliefs and wisdom are carried by oral tradition; it must be experienced first hand on the land with use of the indigenous language.

The language keeps the people whole and connected to the Creator and to the land and its resources, and within the Secwepemc language, exists the unique Secwepemc worldview and identity. The participatory lessons contained within the language maintain teachings of the responsibilities we have to the natural world. Generally speaking, because the Secwepemc language is being replaced with the dominant language of English, the dominant cultural framework takes over and displaces Secwepemc cultural values, beliefs and practices (Maffi, 2001). The context and values communicated through English do not accurately represent the core values, philosophy and beliefs of Secwepemc culture.

Language is the main tool to maintain, elaborate, develop and transmit knowledge to

future generations (Maffi, 2001) and ensures that the teachings of the Secwepemc responsibility to maintain a balanced and harmonious relationship with the land and one another are upheld. Secwepemc language transmits the traditional cultural and ecological knowledge needed to protect biological and cultural diversity for future generations. Secwepemc language is the most culturally relevant method of transmitting knowledge to following generations. The survival of the Secwepemc culture is dependent on perpetuating our values, perspectives and sophisticated knowledge system. The unique cultural, ecological, geographic and historical knowledge is transmitted through the Secwepemc language, and must be maintained in its natural form, as much as possible.

Traditional teachings of the Elders state that cultural survival is dependent upon the health and well-being of the land and unfettered access to the natural resources. For this reason, the land must be protected so it can continue to provide them with sustenance. The place-specific and subsistence-related TEK and wisdom, gained through a participatory information feedback process with the land and natural resources, provides them with a clear awareness of the long-term social and ecological implications of their actions (Cajete, 2000). From their intimate knowledge of the land they practise balanced resource use and caretaking regimes which make relatively light demands of the local resources.

Secwepemc resource management practices, world view, classification system and accumulated knowledge and wisdom about the human–environment relationship is losing relevance and disappearing with the magnitude and type of current amenity migration. Directly or indirectly, the Secwepemc people, who uphold their responsibility to the land and culture, feel that AM is also one of the major causes of biodiversity disappearing at a rate 50 to 100 times faster than it would naturally (Secretariat of the Convention on Biological Diversity, 2004b). Loss of access to our hunting and gathering grounds severs the connection with the land and resources, and deconstructs the traditional Secwepemc education process. Severely degraded land or removal from daily direct contact and hands-on interaction with the surrounding environment leaves little room for subsistence. Maffi describes this phenomenon as

‘extinction of experience’: the radical loss of experience that comes through subsistence and other daily activities (Maffi, 2001: 7).

Customary land-use practices include traditional conservation methods that ensure sufficient resources are available not only for the needs of present generations but for future generations as well. In addition to the more practical conservation methods, such as landscape burning, rotational hunting and harvesting techniques, spiritual ceremonies, songs and dances also play an important role in taking care of the land and its resources. For example, Secwepemc men endure 4 days of fasting, sweat bathing, praying and singing to offer prayers for the game and their habitats. ‘Yecwiminte r tmicw’ is a term in the Shuswap language that translates to ‘taking care of the land’. It attests to Secwepemc consciously practised land stewardship and, through an emotional and spiritual connection to the land, maintains ecologically sensitive caretaking regimes, which enabled the Secwepemc to survive in healthy functioning ecosystems for thousands of years.

Despite the fragmented condition of the Secwepemc culture, the Secwepemc continue to strive to maintain traditional values, beliefs and practices involving various aspects of the traditional Secwepemc way of life on the land. Many families rely on traditional foods and medicines for whole or partial sustenance. Many participate in spiritual practices, such as sweat baths and vision quests in the mountains. The Secwepemc continue to uphold the responsibility of taking care of the animals, birds and plants to the best of their ability despite the many threats brought on by AM. The local Secwepemc subsistence activities, which traditionally did not affect biodiversity negatively, and in some cases fostered it, are being replaced by the environmentally unsound practices of the SPRC and amenity migration in Skwelkwelkwelt.

Environmental impacts

While the customary land-use practices of the Secwepemc have minimal environmental impact, current mainstream land-use practices, such as mass tourism, settlement and forestry, mining and other commercial developments negatively

impact the quality of the land, air, water, plants and animals in Secwepemc territory. The Secwepemc belief of people being intimately interconnected with nature and their conservation ethics and practices that promote respect and care of the land are not significantly rewarded in the dominant society. This is a strategic disadvantage common for indigenous peoples (Messerli and Ives, 1997; Moss and Godde, 1999), and a social trap or mindset that makes it quite difficult for most non-Secwepemc to empathize with the negative effects that developments such as the SPR have on the Secwepemc culture. Because cultural survival and diversity are often entwined with environmental conservation and biodiversity, the loss of either causes the loss of the other (Stevens, 1997). Therefore, the environmental effects of AM, and the actions of the SPRC and its affiliated key stakeholders catering to the amenity migrants at SPR, must be considered crucial to the conservation of biological diversity.

Although Sun Peaks has an environmental policy (Box 10.1), it does not consider the Secwepemc as part of the environment, nor does it consider the effects of amenity migration on our culture. The Sun Peaks Resort's perception of the environment, as it is communicated in their environmental policy, is limited to the narrow view of the environment being only land, flora, fauna and natural processes, and fails to

recognize the key role that the Secwepemc and their culture plays in sustaining healthy environments and vice versa. Any perspective that excludes considering people as a part of nature is in opposition to the Secwepemc view and that of a growing number of people around the world who are seriously concerned about the future of our biosphere and, in particular, the role being played by mountains (Messerli and Ives, 1997).

Sun Peaks Resort Corporation states: 'we recognize that maintaining the natural environment is essential to maintaining the quality of life we now enjoy...' (see Box 10.1). However, no consideration or respect is given to the Secwepemc concerns, quality of life or traditional connection to the land in Skwelkwekwelt. Elders instinctively know, without 'scientific studies', that Skwelkwekwelt is being rapidly destroyed and the threat of extinction as a distinct people is real. Elders remember when MacGillvary Creek, which runs through the SPR, was teeming with Dolly Varden fish, and remember setting up hunting camps on Mt Morrisey where there are 'now 117 ski runs, spread over the second largest skiable terrain in BC' (Sun Peaks Resort Corporation, 2004: para. 2). Secwepemc Elders know that, in addition to the declining fish stocks, the quality and quantity of plants and medicines is being critically compromised.

Sun Peaks also states that 'we comply with, or exceed, all applicable environmental laws

Box 10.1. Environmental Policy of Sun Peaks Resort Corporation

Sun Peaks Resort Corporation recognizes that maintaining the natural environment is essential to maintaining the quality of life we enjoy now and wish to protect for future generations. With this goal in mind, the resort is committed to conducting its operations in an environmentally responsible manner, which respects the land, its flora, fauna and natural processes. Specifically we will:

- Comply with, or exceed, all applicable environmental laws and regulations.
- Minimize adverse environmental impacts from our operations.
- Promote environmental awareness.
- Monitor our performance with respect to the environment, by periodically reviewing our practices, procedures and objectives.
- Train our employees and contractors to incorporate good environmental practices in all aspects of our operations.
- Communicate our performance to our directors, employees, contractors and customers.
- Review our Environmental Management System on a regular basis to continually improve our performance

Source: <http://www.sunpeaksresort.com/winter2/environment.aspx>

and regulations' (see Box 10.1). However, from observations of their development activities, environmental degradation is indeed occurring at Skwel'kwelt. Quality of water, land and air is rapidly changing for the worse. Sun Peaks maintains a 145 million litre snow-making water reservoir (Hewlett, 2003), which draws from the mountain water table. Excessive amounts of water are also being used for making artificial snow and the laundry facilities at the company's seven on-mountain hotels. In addition to this extraordinary consumption of water, harmful detergents contaminate what Secwepemc Elders teach is the most important source of water for the highlands and for the lowlands below – the high mountain streams. Personal communications with a Secwepemc person living at one of their home sites established outside the SPR area reported huge trucks bringing out loads of sewage after waste water systems failed.

Great amounts of water and hydroelectric and thermal energy are being used, and large amounts of sewage and waste water are contaminating the watershed that supplies the local Thompson Nicola Regional District. Amounts of water being used and sewage produced are rapidly increasing with the size of the expansion. Exhaust fumes from vehicles used to transport people and goods in and out of Sun Peaks, as well as recreational vehicles, such as cars, quads and snowmobiles, are contributing to a decrease in air quality, an increase in wildlife out-migration and significant reduction in forest cover and fragmented forest floor. The loss of forest cover contributes to the forest's inability to hold and cycle water through the ecosystem.

Another example of environmental degradation caused by SPR is its 'sheep experiment'. In the summer of 2003, sheep were used to graze on the steepest slopes. Three hundred and thirty sheep were released in the hope that they would 'eat everything down to within inches of the ground'. Sun Peaks described the sheep experiment as 'an environmentally friendly method' of removing unwanted brush (Evans, 2003: 1). However, for the Secwepemc, it is a serious threat to maintaining biological diversity because the sheep eat everything including roots, berries and medicinal plants.

Sun Peaks development activities have the potential to inflict even greater damage to

Secwepemc traditional-use areas if their proposed paved second access route to Sun Peaks from the nearby town of Chase, BC is approved by local government. The corporation's justification is that it will provide tour buses and other vehicles with a shorter access route to Sun Peaks (Fortems, 2003). The proposed road would cut right through Secwepemc traditional territory and additionally damage other important hunting and food-gathering areas.

Socio-economic impacts

Competition between the amenity migrants and their agents (especially SPRC and the BC government), and the Secwepemc for the traditional lands and resources has created vast economic discrepancies between the Secwepemc and these agents. Principally due to the Secwepemc unresolved claim to the land within the boundaries of the Neskonalith Douglas Reserve, they are the poorest people (money-wise) living on their traditional lands. The Secwepemc receive no remuneration or other economic benefit for the sale, lease and other uses of our land. Instead, token offerings of insignificant forms of economic benefits from Sun Peaks have been offered to a few 'hand-picked' Secwepemc whose interests are sometimes contrary to the protection and conservation of our traditional resource rights. Youth, Elders and traditional land users with cultural integrity refuse to be showcased as spectacles, and have declined opportunities to sing, dance and entertain the tourists.

Social disharmony within the Secwepemc community exists as a result of governments and private enterprise taking advantage of intra-tribal differences. One example of this is demonstrated through the actions of two Secwepemc Indian Bands representing the federal government's Department of Indian Affairs (DIA). The bands entered into an economic development agreement with Sun Peaks to receive only a minimal share of staff housing in the development. Contrary to the position taken by the DIA-elected representatives of the bands, the Secwepemc traditional land users want the land and resources protected for traditional uses and will not abdicate this position in exchange for token economic benefits.

In 2003, Matthew Ramsey reported in the *Vancouver Sun* newspaper that economic losses to Sun Peaks during that year's pronounced wildfire season were approximately CAN\$80,000 per day and an estimated total of CAN\$600,000 due to road closures and evacuations. The sale of real estate in the SPR generates large revenues from which it and the SPRC are greatly benefiting from Secwepemc lands. The mark-up on parcels of land being sold by SPDC further illustrates the inequitable compensation gained from the expanding exploitation at Skwel'kwelt. The corporation buys land for CAN\$5000 per 0.4 ha from the BC government (Province of British Columbia, 1993) then subdivides and sells building lots for an estimated price ranging from CAN\$70,000 to CAN\$170,000.

Legal Challenges

Non-recognition of Secwepemc land title and rights and the considerable rapid changes being caused by amenity and other in-migrants are escalating tension and conflict over land and resource management at Skwel'kwelt. The animosity between the Secwepemc, SPRC, the BC provincial government and a handful of racially insensitive in-migrants is also likely to extend to other areas throughout Secwepemc territory if there is no resolution to the unsettled aboriginal land issue in BC.

The BC government and SPRC fail to recognize the distinctness of Secwepemc rights and responsibilities to the land and its resources. Secwepemc youth, Elders and traditional land users hold the BC provincial government responsible for illegally selling what the government considers to be Crown Land using a fee simple land-ownership system. As stated in the Development Agreement between Her Majesty the Queen in Right of the Province of British Columbia and Tod Mountain Development Ltd (now known as the SPRC) (Province of British Columbia, 1993: 11):

Tod Mountain will be entitled to purchase Crown Land from the province, in Base Area Phases that correspond to particular Mountain Phases, to be developed in accordance with the land uses and densities specified in the Tod Master Plan.

Upon visiting the SPR, it is plain to see how, after purchasing the land from the Crown, Sun Peaks Realty, also known as Re/Max Alpine Resort Realty, then sells the land to other developers, who subdivide it into parcels for private buyers (Re/Max Alpine Resort Realty, 2005). Secwepemc traditional land users take the firm position that based on their long-standing title and rights to the land in Secwepemc territory, they are not required as tribal members or traditional land users to purchase the land through the fee simple system. Under the fee simple system, the land is not only taken out of local control, but the resulting escalated land costs are unaffordable to both the Secwepemc and the average local non-Secwepemc residents in the area.

In addition, the BC government has issued 50-year leases (Province of British Columbia, 1993: 44) for land under the ski lifts, and gave Sun Peaks the exclusive rights to use large areas of surrounding land for recreational purposes. The Secwepemc traditional land users believe that the non-recognition of their land title and rights as it is demonstrated in the agreement reached between the BC provincial government and Tod Mountain Ltd (SPRC) violates several national and international human and indigenous rights, laws, charters and conventions.

First of all, land has been sold where the title is being legally contested. Secondly, long-term leases, licenses of occupation and controlled recreation agreements are being issued that state that no one, including the Secwepemc, other than the licensee, can use the land under lease for any purpose other than what is stated in the terms of the lease. This not only denies Secwepemc title and rights, but also purposely divests our sovereignty, control, access and jurisdiction to use and manage our traditional territories and resources as we have done since time immemorial.

Actions Taken to Date

Direct and legal action

The Secwepemc Elders and traditional land users adamantly oppose the SPR expansion plans and resulting destruction of Skwel'kwelt. Community members from the Adams Lake and

Neskonlith Indian Bands, who are directly affected by the development of these plans, have been repeatedly excluded from the related planning and decision making and have not given their prior informed consent. In November 1998, several Elders, traditional land users and elected Chiefs and Councillors met with representatives from SPRC and issued a statement that outlined their opposition (*Secwepemc Elders Statement*, 1998). The corporation ignored the statement and continued with their massive expansion plans. The Elders and traditional land users have since embarked on a campaign to inform visitors, investors and the local public of the destruction of their lands and the outstanding land-ownership and jurisdiction issues (Fig. 10.1). This campaign has also been extended throughout Canada, and internationally to the USA, Japan and Europe. Many coalitions with environment, social justice and human rights groups have been established to assist the Secwepemc with information and action campaigns.

Beginning in October 2000, the Secwepemc re-established many home sites in the Skwelkwekwelt area, and the Skwelkwekwelt Protection Centre was built to assert Secwepemc

title to the land and protect the land from further degradation due to Sun Peaks. Homes were also built on seven different sites in Skwelkwekwelt and were destroyed by SPR personnel with the assistance of the BC government and the Royal Canadian Mounted Police (RCMP). Under the false jurisdiction of the *British Columbia Lands Act*, the government issued a trespass and seizure notice to Secwepemc residents occupying these homes (Department of Justice, Canada, 1982). These notices were enforced by the RCMP and were also used to destroy a family home at MacGillvray Lake, some 8 km from SPR. Ironically, this home was destroyed on December 10, 2001, International Human Rights Day. In violation of *Article 5* of the *International Convention on the Elimination of All Forms of Racial Discrimination* (United Nations' Office of the High Commissioner for Human Rights, 1969), two Secwepemc sacred sweat lodges were destroyed on the same day.

In attempts to assert and protect Secwepemc title to the land, Secwepemc traditional land users and protesters have repeatedly endured humiliating removal by force. Several Secwepemc people were charged with criminal



Fig. 10.1. Members of the Secwepemculecw Traditional Peoples Government (STPG) protesting the expansion of the Sun Peaks Resort, BC, Canada (photograph: courtesy of STPG, September 2004).

offences and some 54 arrests took place, including Elders and youth. Many Secwepemc and their supporters have received court orders prohibiting them from entering the Sun Peaks area. One woman has a restriction that prevents her from going within 10 km of Sun Peaks, an order that has been in effect for 3 years (A. Soper, British Columbia, 2004, personal communication). Rather than deal with the real issues of land ownership and jurisdiction, the British Columbia government chooses to manipulate the criminal justice system.

The community members are fortunate to have the strong leadership of former Neskonalith Chief Arthur Manuel, who is also Spokesman for the Indigenous Network in Economics and Trade. Under the direction of the most active Secwepemc Elders and traditional people, campaign letters have been written to the governments of Canada, British Columbia and the SPRC. The Secwepemc insist that SPR respect the Constitution of Canada, Section 35(1), which states, 'the existing aboriginal and treaty rights of the Aboriginal peoples of Canada are hereby recognized and affirmed' (Department of Justice, Canada, 1982). The Secwepemc also insist that the governments acknowledge outstanding and unceded land issues by respecting the two recent and quite important court decisions regarding aboriginal land title.

The historic *1997 Delgamuukw Decision of the Supreme Court of Canada* recognized *Aboriginal Title* (Library of Parliament, 2000: para. 1). In addition, The Haida Decision of the British Columbia Court of Appeal of 2002 ruled that the Government of British Columbia and corporations must consult with indigenous peoples and meaningfully accommodate aboriginal interests in any development taking place on our traditional territories whether Aboriginal Title has been established or not (Aboriginal Affairs and Northern Development, 2003). Despite the recent court decisions ruling in favour of aboriginal peoples in BC and Canada, the federal and provincial governments assume 100% control and jurisdiction and refuse to address outstanding land issues in Skwelkwekwelt (*aka* Sun Peaks Resort). Instead the federal and provincial governments pressure the Secwepemc to join in the British Columbia Treaty Process. But, entering into the treaty process would force the

Secwepemc to extinguish title to most of their traditional territories in exchange for a slightly bigger and inadequate Indian reservation and a cash settlement (A. Manuel, British Columbia, 2002, personal communication).

The southern bands of Secwepemc continue to pressure the Governments of Canada and BC to work out a just and honourable land settlement apart from the BC Treaty Process. In the process of pursuing a land settlement, the Elders and traditional land users continue to inform local and regional governments, development corporations and forestry companies of the outstanding land issues and insist they comply with the legal obligations as they are set out in court rulings and the Canadian constitution. The Secwepemc are determined to continue to assert Secwepemc Title and Rights and uphold the sacred responsibilities of protecting, maintaining and conserving the traditional territories through direct action and continued use of the traditional resources in Skwelkwekwelt.

Other actions undertaken

Extensive interviews with Elders on historical and present-day uses in Skwelkwekwelt have been conducted. The Adams Lake and Neskonalith communities completed a Traditional Use Study that included interviewing Elders and traditional land users regarding their use and occupancy of the land in the core of Secwepemc territory. All interviews were recorded and traditional use sites were placed on maps. These studies will be used in various court cases to prove continuous use and occupancy of the land (Adams Lake and Neskonalith Secwepemc, 1999).

Alliances have been formed with other indigenous peoples who are facing similar encroachment and degradation of their lands and threats to their traditional life ways due to land development in Canada, USA, Colombia, Ecuador and Guatemala. Since BC was awarded the 2010 Winter Olympics, there is considerable additional pressure to develop ski resorts on unceded aboriginal land throughout the province. The Stat'imx, the neighbouring nation to the Secwepemc, and the Cheam peoples of the Pilalt territory in BC are also facing massive destination resort development projects in their

traditional territories. Elders and traditional land users in all of the aforementioned nations remain opposed to the proposed developments. The Secwepemc have also formed many alliances with environmental groups, churches, labour unions and social justice and human rights groups who are helping to publicize the concerns and pressure governments to work on the unsettled land issues.

A team of highly committed and motivated Secwepemc and non-Secwepemc have devoted many volunteer hours to informing the public of the issues through a wide variety of media. In addition to regular press releases, which are distributed mainly through the internet, mail and radio stations, the Secwepemc have contributed numerous articles to various publications in Canada, the USA, Europe and Japan. High-profile coalitions such as the BC Coalition for Sustainable Forest Solutions and environmental organizations such as the Western Canada Wilderness Committee have featured Secwepemc concerns and activist campaigns. Under the direction of the Skwelkwekwelt Protection Centre, three videos were produced which inform and educate viewers of the outstanding Aboriginal Title and Rights, as well as environmental issues in Skwelkwekwelt.

Secwepemc youth, Elders and traditional land users have organized many peaceful demonstrations at Sun Peaks and in BC cities such as Kamloops and Vancouver. In the spring of 2001, the Secwepemc organized a large demonstration during the SPR's Much Music Snow Job Festival. This demonstration was considered high impact because the event brought thousands of visitors to Skwelkwekwelt. The demonstration resulted in a Much Music announcement stating that the festival will not be brought to Sun Peaks again until the land issue is settled.

The Secwepemc Elders and traditional land users who inhabit the Adams Lake and Little and Big Shuswap Lake regions are working on a number of local projects which are proactive and will create a model for peaceful co-existence between the Secwepemc and non-Secwepemc. In the same vein, the *Lakes Secwepemc Traditional Resource Research and Development Guidelines* (Morrison, 2004) were formulated. The guidelines outline an ethical code of conduct for governments and enterprises who are proposing research, education or economic

activities on Secwepemc territory and aim at protecting Secwepemc cultural and biological diversity from exploitation by outside organizations. Another important project is the Yecwiminte r Tmicw – Harper Lake Restoration Project. Under the direction of Elders, community members and traditional land users and all affected constituencies will be involved in the development of a sustainable forest management plan in the Harper Lake area.

International campaigns

The Secwepemc have developed a large support network in Europe and Japan. Groups such as The Society for Threatened Peoples work to inform the public and put pressure on the Canadian government to settle Aboriginal title and rights issues. In addition, community members have made presentations at various international speaking events, with Arthur Manuel in particular attending many international forums throughout the world. The European and Japanese people are shocked to learn of such unjust treatment of aboriginal peoples in Canada. Generally speaking, the Canadian government's rhetoric and biased perspectives in the media depict indigenous peoples as 'well taken care of' by Canadian governments, and that there are no problems. Secwepemc leader Arthur Manuel, assisted by Nicole Schabus, who is an international advisor with the Indigenous Network on Economics and Trade, have made a number of submissions and official complaints to United Nations international bodies, which include:

- Convention on Biological Diversity Article 8j and related provisions. Towards better practices, Sec 1.4 Worst practices, in-depth case study on ski resorts in sensitive mountain ecosystems (submission accepted) (Manuel, 2004b: p. 19)
- Appellate Body World Trade Organization *Amicus Curiae* submission on the appeal of the decision in United States final countervailing duty determination with respect to certain softwood lumber in Canada WT/DS257/4 (submission accepted) (Manuel, 2003)
- Article 1904 Binational Panel Review pursuant to the North American Free Trade

Agreement *Amicus Curiae* submission in the matter of: certain softwood lumber products from Canada: Final affirmative countervailing determination and final negative critical circumstances determination (submission accepted despite the opposition of Canada) (Manuel, 2002a).

- Official complaint to the International Olympic Committee. Concerns of aboriginal Elders, land users and native youth regarding the impacts of the 2010 Vancouver–Whistler Olympic Bid on aboriginal people, culture, land and environment (submission accepted) (Manuel, 2002b).
- United Nations Committee on the elimination of racial discrimination, *Report on Racial Discrimination Against Indigenous Peoples in Canada* (Manuel, 2002c)

Next Steps

Legal

The governments of Canada and British Columbia must be convinced to respect and follow the Constitution of Canada, especially Section 35 and the recent rulings of the BC Supreme Court of Appeal and Supreme Court of Canada. The Supreme Court of Canada's *Degamukw Decision* recognizes Aboriginal Title as 'collective rights' that come from the land and the specific activities that take place on the land. The *Haida vs. British Columbia and Weyerhaeuser Ltd* decision ruled that governments and corporations must consult with indigenous peoples and meaningfully accommodate their interests as it relates to their traditional territory. The *Haida vs. British Columbia and Weyerhaeuser Ltd* case found that even where aboriginal peoples have not yet proven their title, initial research and indicators of cultural and traditional values are enough to trigger the government's and industry's duty to consult and accommodate indigenous people (Manuel, 2004a). Following the Haida ruling, good faith negotiations were shown to be the solution to resolving outstanding land issues. But if the government continues to maintain 100% exclusive jurisdiction, investor confidence will be undermined and the uncertainty resulting from unsettled land and resource issues will deter business in

local communities because 'extractors and purchasers cannot legitimately acquire full title over the resources' (Manuel, 2002a: 21).

Article 8 (j) of the United Nations' *Convention on Biological Diversity* has recognized the principle of free, prior informed consent, which means that subject to its national legislation, governments and industry are required to:

respect, preserve and maintain knowledge, innovations and practices of indigenous and local communities embodying traditional lifestyles relevant for the conservation and sustainable use of biological diversity and promote their wider application with the approval and involvement of the holders of such knowledge, innovations and practices and encourage the equitable sharing of the benefits arising from the utilization of such knowledge, innovations and practices (Secretariat of the Convention on Biological Diversity, 2004a).

In other words, governments and industry are required to seek indigenous peoples' consent before any development can take place on their traditional territories. Since the Secwepemc have never given prior informed consent to expand the SPR at Skwel'kwel't, the Sun Peaks Corporation and the BC government (who provided the permission to Sun Peaks) are violating international law and the constitution of Canada.

The government and corporations continue to capitalize on Secwepemc impoverishment. Nevertheless, the Secwepemc will significantly expand their political and economic power to obtain recognition of their traditional land and title rights, laws and regulations. Financial and human resources are required for developing and implementing projects that include restoration and rehabilitation of damaged areas; ecologically and culturally sustainable land use plans; and research and development for the re-establishment of traditional governing policies and structures.

Research and development is critical to undertaking the intensive ecosystem-based land-use planning that is required within Secwepemc territory. Strategic analysis and planning as described by Laurence Moss (Moss, 2004; Moss *et al.*, 1999) would be very useful to the Secwepemc. This approach was instrumental in identifying and explaining amenity migration and in formulating and undertaking related community analysis and

action (Moss, 2004, Chapter 1, this volume). To date, there have been no similar analyses or strategies formulated to address the current unsustainable mountain development within Secwepemc territory, especially in Skwel'kwelt.

Other particular approaches and solutions which promise effective pay-off for the Secwepemc are found in two recent reports: *Implications and Recommendations for Policy and Action* (Godde, 1999) and *Amenity Migration* (Stewart, 2002). The former recommends the following core perspectives and actions (p. 36):

1. Holistic management strategies,
2. Local ownership and control of resources,
3. Supportive national and regional policies,
4. Balance between highland and lowland resources flows and decision-making,
5. Local knowledge and traditional systems of social and environmental management,
6. External knowledge and technology,
7. Infrastructure development appropriate to fragile environments,
8. Reinvestment of tourism revenues into conservation,
9. Equitable distribution of tourism benefits and opportunities,
10. Full integration of women,
11. Organizational capacity building,
12. Skill-based training,
13. Awareness-raising of all stakeholders,
14. Partnerships and
15. Continuing research and information exchanges.

Susan Stewart in her review of amenity migration in rural USA suggests the following as key areas of analysis (Stewart, 2002):

- Migration patterns and trends with emphasis on potential growth and change in resource-rich and environmentally sensitive areas.
- Impacts of rural residential development on physical, biological and social systems.
- The nature, causes and remedies of community conflict, especially related to resource management.

The Secwepemc, however, must be fully and meaningfully involved in the generation of such

information, and the planning, policy and programme formulation and implementation, and where they are not the proponents, must provide their consent to any recommendations and land-use plans within their territory. A major issue is how and where and when can the Secwepemc obtain funding for these critical activities.

Furthermore, environmental laws and policies must be changed to address Secwepemc issues. For example, Secwepemc land management regimes must be considered an integral part of the environment. Health Impact Assessments must be conducted as a part of any environmental study. Presently such assessments are not included in the Canadian Environment Assessment Act, and they are needed to show how Secwepemc health is affected when access to traditional foods from the forests is not obtained. Cultural and social impact assessments must also be undertaken. These assessments will help determine how the Secwepemc are impacted by the degradation of, and lack of access to, their traditional resources.

Finally, the Secwepemc must continue challenging the denigration and non-recognition of their Aboriginal title and rights, by continuing to work diligently until satisfactory resolutions to these issues are reached.

Some Conclusions

It seems possible for the harmful effects of amenity migration impacting the Secwepemc to be effectively eliminated or reversed if the key stakeholders demonstrate goodwill, mutual understanding and respect. The governments, corporations and the general public must reconcile the past unjust treatment of the Secwepemc by committing to fundamental and positive change. Maintaining the status quo of oppression, paternalism, racism and impoverishment of the Secwepemc perpetuates the devastation caused by loss of their land, culture and identity. This can be only accomplished when the Canadian and British Columbia governments recognize and acknowledge the Secwepemc as fellow human beings.

A new era of reconciliation will need to be centred on recognition and acceptance of Secwepemc Aboriginal title and rights. A model

for harmonious co-existence can be developed when the Secwepemc way of life is no longer faced with continuous threats by amenity migrants, and they are allowed to maintain their integral connection to the land. Secwepemc knowledge has enabled the land to flourish for thousands of years and must be acknowledged and respected. Secwepemc cultural rights must be on parity with residential, commercial, indus-

trial and, especially in the case of Skwelkwekwelt, recreational interests. The development at Skwelkwekwelt, which is being driven significantly by amenity migration, can be considered one of the contributing factors leading the Secwepemc to extinction and must be halted. There is too much at stake for the environment and for all people if they fail to follow the natural law of the land.

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11 Planning for Amenity Migration in Communities of the British Columbia Hinterland

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This chapter describes a case of collaboration between academic planning researchers and the communities of an isolated valley in which planning to promote and control amenity migration might make a substantial contribution to economic and social sustainability. At the time of writing, the collaboration has worked very well, so an account of it may be useful to planners and communities in other parts of the world.

Amenity Migration as a Means of Local Economic Development

In parts of British Columbia (BC) and the north-western USA that are distant from cities, especially the mountainous interior, the mining, logging and ranching industries which once supported hundreds of small towns and rural districts are employing fewer and fewer people. Economists say this trend is an almost inevitable consequence of two phenomena at work in the global economy (Blakely, 1994). First, materials represent a smaller and smaller share of the overall value of goods and services because knowledge adds more and more value to what the affluent world consumes – such products as computers, video recordings, mutual funds and frozen prepared foods. Second, because of this ‘decoupling’ of the value of materials from economic growth, the prices of natural resources no longer track

economic cycles. If resource extraction firms want to increase profits or avoid insolvency, they must raise their productivity through mechanization – utilizing more machines and fewer workers.

With declining resource employment, towns and rural districts in the mountainous hinterland have few alternative sources of economic growth and population renewal. They may actively pursue small-scale tourism or simply welcome it. They may invite large-scale resort development or they may just hope for it. Finally, they may attract amenity migrants, intentionally or without deliberate effort.

Small-scale tourism is problematic. Economists familiar with the mountainous West are sceptical that it makes sense for communities or districts to opt for tourism as a source of economic development (Power, 1996; Booth, 2002). Furthermore, nature-based tourism is not easily reconciled with sustainable development (e.g. Nepal *et al.*, 2002) or local ways of life (Payne *et al.*, 1999) and in hinterland British Columbia and adjacent parts of the USA, resources on which to develop heritage tourism are modest, except perhaps for First Nations. If a community integrates itself enthusiastically into provincial or state tourism strategies, it runs the risk of ceding control over its future to distant decision makers, who may care nothing about local quality of life.

As for large-scale resort development, anecdotal testimony and a modest amount of academic

research converge on the view that it is a bad thing for the host community. Undesirable features of resort development include soaring property values, which drive out the original population, runaway growth, degradation of local environments, disruption of community, displacement of traditional ways of life, acceleration in the pace of life, objectionable displays of wealth and rising levels of crime (Rothman, 2000; Clifford, 2002). A community's loss of control over its own fate is almost certain. A single downhill ski resort town can generate astonishing levels of economic activity. For instance, Whistler, British Columbia, apparently accounts for about CAN\$1 billion a year in economic turnover. With this kind of money at stake, provincial and state governments may encourage resorts no matter what local people think of them. Recently the government of British Columbia passed legislation, the Significant Projects Streamlining Act (see *Revised Statutes and Consolidated Regulations of British Columbia*), empowering itself to override virtually any obstacles local municipalities might place in the way of resort development proposals.

Some authorities regard amenity migration as unwelcome for reasons of its own. Planners warn that amenity migrants may distort the proper functioning of long-established communities by raising property values, importing new cultural values and displacing traditional land uses such as agriculture (e.g. Moss, 1994; Glorioso, 1999). Sociologist Patrick Jobses (2000) has concluded from his research that amenity migrants commonly suffer from illusions and do harm to both themselves and established residents when they move into beautiful places. Environmental scientists are concerned that amenity migrants occupy ecologically rich habitat on valley bottoms and disturb wildlife when they pursue recreation in the back country (e.g. Hansen *et al.*, 2002). Economists, on the other hand, tend to recommend amenity migration as a means of economic development which is more environmentally benign than alternative uses of natural resources and natural or semi-natural environments (e.g. Power, 1995, 1996; Booth, 2002).

How amenity migration is viewed seems to depend a great deal on whether it occurs in developed or developing countries, whether it is managed or not, whether the in-migrants are culturally similar to the people of the receiving com-

munity or not and so on. Objections may be fewest and least emphatic when the receiving community has had a resource-exploitation economy and when that economy has abruptly collapsed. Common sense leads one to expect that social friction would be in inverse proportion to the cultural similarity between in-migrants and long-term residents.

For communities meeting the description just given, amenity migrants may look like a very attractive replacement for the forest, mining, fishing or farm workers and families whose incomes have fallen victim to mechanization, downsizing, mergers, resource depletion or stagnation in unit prices. If nothing else, in-migrants sustain property values and allow outgoing residents to sell their houses or land at satisfactory prices. Moderate rates of population growth bring on prosperity without producing unmanageable change in the local built environment or a breakdown in local culture. Even when amenity migration develops spontaneously and the growth of a town or district accelerates out of control, the larger polity of state, province, county or regional district may consider the additional economic activity well worth the problems.

For a town or rural district suffering a decline in its resource industries though, the challenge is control: stimulating enough amenity migration but not too much, determining that new residents fit into the community without either frustrating or replacing it, minimizing environmental losses. Bottom-up initiation, encouragement and channelling of this sort are what community planning traditionally does for other kinds of economic and residential development. There is no reason to think local planning cannot do it also for amenity migration – except that in the case of amenity migration, no off-the-shelf toolkit of measures to promote and manage yet exists.

Planning to Attract and Manage Amenity Migration in Rural British Columbia

In 2003, many British Columbian hinterland mountain towns were being challenged by an abruptly noticeable decline in their resource

economies. At the same time, entrepreneurs were proposing to develop large ski or snowmobile resorts near several of them. For this reason, in June, July and August of that year the author conducted a survey of administrators and planners responsible for these communities. The purpose of the survey was to measure municipal planning capacity insofar as it depends on factors such as understanding of the consequences of either resort development or amenity migration, ability to monitor rates and sources of migration and awareness of planning tools needed to control resort development or amenity migration. Seventeen communities contributed substantially to the main sample of the survey, including Stewart, Kitimat, Hazelton, New Hazelton, Moricetown, Smithers, Houston, Vanderhoof, McBride, Golden, Revelstoke, Nelson, Radium Hot Springs and the Regional Districts of Bulkley-Nechako, Okanagan-Smilkameen, East Kootenay and Central Kootenay. Several communities with longer or more rapid histories of resort development and amenity migration, namely Banff and Canmore, Alberta; Whistler, British Columbia; Aspen, Colorado; and Jackson Hole (Teton County, Wyoming) served as a touchstone of planning experience and wisdom.

Detailed findings of the survey are being reported elsewhere (Chipeniuk, 2004). Broadly, what the survey found was that planners and administrators responsible for hinterland communities had little appreciation of what amenity migration is, how large a contribution it might make to local economies, how much of it is already going on or how to stimulate and manage it. Most of them appeared to regard both resort development and amenity migration as generally positive for their communities. They did not see them as alternatives. Generally, the study found that no community, not even the ones where immigration was a phenomenon of long standing and well understood, had adequate means of tracking the extent and character of amenity migration. Communities on the verge of transformation by resort development and amenity migration lack the expertise, personnel or financial resources to do the kind of planning they should be doing, and they recognize their own inadequacy in these respects. Most of the subject communities are not doing anything systematic either to attract or to manage amenity migration.

The Bulkley Valley Planning for Amenity Migration Initiative

In the course of the survey of planners and administrators just referred to, the author met with several officials of the Bulkley Valley, in north-western British Columbia, including municipal councillors. Once amenity migration was explained to them, they urged that something be done about it. The question was what? Although the literature on amenity migration is substantial, it includes very few reports on planning. Those few divide into reports on situations where amenity migration is occurring without deliberate stimulation (e.g. Glorioso, 1999; Moss and Glorioso, 1999) and reports offering guidance on how a community that has already made up its mind in favour of amenity migration can increase it (e.g. Fox, 1995). Academic studies referred to nothing like a planning toolkit which could assist a community in building consensus up from a stage at which the population of a town or district has not yet determined whether it should proceed with planning for amenity migration, much less how. Perhaps the best practical guides for promotion are *Destination Florida Commission's Final Report with Recommendations* (Destination Florida Commission, 2004) and *Economic Expansion Using Retiree Income: a Workbook for Rural Washington Communities* (Severinghaus, 1990). In general, planning studies, whether academic or applied, have focused on amenity migrants who are retirees – and there are many kinds of amenity migrants besides retirees (Beyers and Nelson, 2000).

To develop an amenity migration planning toolkit, and at the same time to apply it in a case of participatory action research, a collaborative undertaking has taken shape in the Bulkley Valley of north-western British Columbia. Planning and economic researchers from the University of Northern British Columbia (UNBC) are assisting Valley mayors and councillors, administrators, municipal planners, First Nations officials and other actors in learning about amenity migration and making informed decisions about it. In turn, these local decision makers are cooperating in specific studies. Although the project is still in its early stages, so far it has been highly successful. It may offer lessons in how to commence planning for amenity migration in other hinterland mountain districts of North America, if not necessarily elsewhere in

the world. Whether outcomes will be successful in the long run remains to be seen.

The Bulkley Valley is a deep glacial trench in north-western British Columbia, Canada. As residents are inclined to view the matter, it is defined by metamorphic and volcanic mountain walls extending about 120 km from the town of Houston in the south-east to Hazelton in the north-west (Fig. 11.1). Two branches of the Bulkley River join near Houston and the united stream flows into the Skeena River at the village of Hazelton. However, another valley, the Kispiox, more or less continues the line of the Bulkley to the north, and it is so much linked to the Bulkley in cultural ways that many people are inclined to think of the two as being one.

By most people's standards this is a remote place. South and east of Houston, the Bulkley Valley is separated from the North American acumen by hundreds of kilometres of thinly settled or downright uninhabited country. Westward lies a broad band of coastal mountain ranges and forests in which just three towns are situated, all of them on or near Pacific tidewater. Northward, the wild mountains extend for

roughly 1000 km until they approach the Arctic Ocean at the remotest tip of Yukon Territory. Nevertheless, the Valley is only an hour and 20 min from Vancouver by jet, and excellent paved highways connect it with the big cities of the south.

Technically, the Bulkley Valley falls within the Sub-boreal Pine–Spruce and Interior Cedar–Hemlock biogeoclimatic zones (Meidinger and Pojar, 1991), though in fact most of the valley bottom not converted to pasture, residential or commercial purposes is covered in trembling aspen (*Populus tremuloides*), black cottonwood (*Populus balsamifera* ssp. *trichocarpa*) and mixed wood forests. Generally, the valley floor slopes from roughly 700 m elevation at Houston down to 300 m in the Hazeltons. Smithers is situated at a little over 500 m. Treeline ranges between 1700 m on southerly exposures and less than 1000 m on northerly exposures near glaciers. Avalanche tracks sometimes come right down to the valley floor. Dominant peaks such as Brian Boru and the summit of Hudson Bay Mountain reach heights of 2500 or 2600 m, but from certain vantage points within the Valley one can view the

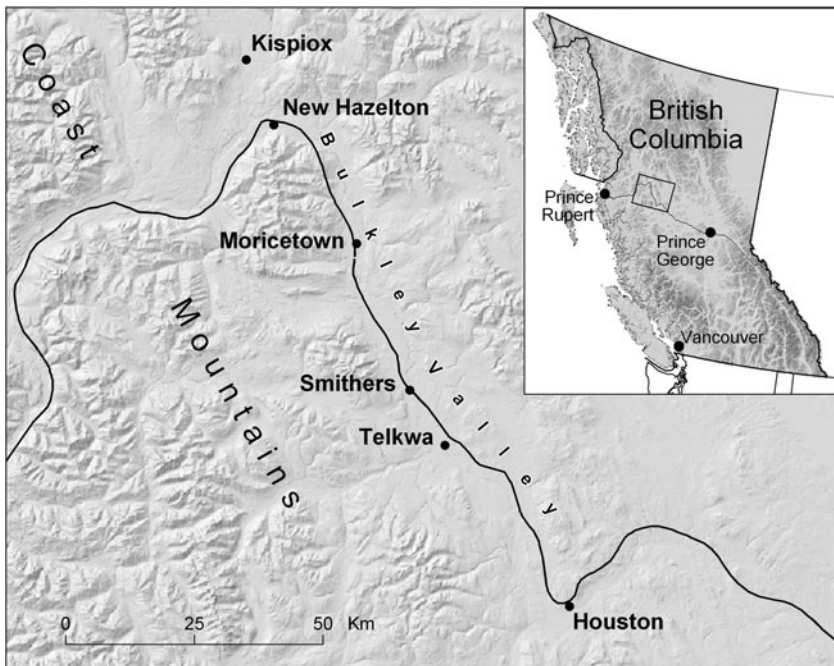


Fig. 11.1. Map of the Bulkley Valley, showing location in British Columbia, Canada. (Map prepared by Nancy Alexander.)

wildly alpine Howson Range and Seven Sisters, rising a little higher still.

At low elevations, 500 to 700 m, snow normally covers the ground between mid-November and late March. At high elevations it can fall in any month of the year and never entirely melts away; glaciers are visible in all directions and skiing of one sort or another is normally good for over half the year. Precipitation ranges between about 60 cm and perhaps 150 cm, according to elevation. Settled areas lie within Plant Hardiness Zone 3, agriculturally suitable only for forage crops and ranching, though many residents successfully raise fine garden vegetables, apples and even cherries during the growing season between mid-April and the end of September.

Large mammal species include grizzly and black bear (*Ursus horribilis* and *Ursus americanus* respectively), wolf (*Canis lupus*), cougar (*Puma concolor*), mountain goat (*Oreamnos americanus*), moose (*Alces alces*), elk (*Cervus elaphus*), mule and whitetail deer (*Odocoileus hemionus* and *Odocoileus virginianus* respectively) and caribou (*Rangifer tarandus*). Large and highly evident bird species are trumpeter swan (*Cygnus buccinator*), Canada goose (*Branta canadensis*), sandhill crane (*Grus canadensis*), bald and golden eagles (*Haliaeetus leucocephalus* and *Aquila chrysaetos* respectively), the ludicrously misnamed 'common' raven (*Corvus corax*) and three species of beautifully winter-white ptarmigan (*Lagopus mutus*, *Lagopus leucurus*, *Lagopus lagopus*). Among the showier fish species are spring salmon (*Oncorhynchus tshawytscha*), coho salmon (*Oncorhynchus kisutch*), pink salmon (*Oncorhynchus gorbuscha*), sockeye salmon (*Oncorhynchus nerka*), steelhead and rainbow trout (both *Salmo gairdneri*) and cutthroat trout (*Salmo clarki*). Populations of most of these kinds of animals are quite high by historical standards and stable despite the fact that only one major park is situated in the Valley, Babine Mountains Provincial Park. Anglers from all over the world pay hundreds of dollars a day in guiding fees to fish local rivers and many immigrants say they were drawn by the fine fishing opportunities of the area.

Beautiful mountain scenery and diverse wildlife are two 'amenities' of the Bulkley Valley, but they are far from the only ones. To a great extent, the cultural features of the Valley are appealing too. In the centuries before contact with Euro-Canadian fur traders and missionaries, Wet'suwet'en and Gitksan First Nations devel-

oped rich, stratified, permanently settled and art-loving societies. Totem poles and scenes depicting Gitksan villages in the northern part of the Valley feature in the paintings of classic Canadian artists such as Emily Carr and A.Y. Jackson (cf. reproductions in Barbeau, 1973) and today busloads of European and American tourists come to visit 'Ksan Village in Hazelton, reconstructed with the assistance of the National Museum of Canada, or the old and perfectly authentic totem poles arrayed on the riverfront at Kispiox. It is perhaps no exaggeration to say that most of the nationally and provincially recognized artists in the Valley are aboriginal, or that they inspire many local non-native artists. Wet'suwet'en fishermen hanging out on ropes to hoop-net salmon migrating up the whitewater fury of Moricetown Canyon have likewise become symbols to non-native residents, somehow expressing the placeness of their chosen lives. Wet'suwet'en and Gitksan people resist accurate censusing, but they make up about one-tenth of the local population. They are concentrated in reserve-based settlements such as Moricetown and Hagwilget but also well integrated into the general communities of the Hazeltons and Smithers.

Certain non-native cultural amenities of the Valley have a regional reputation. These include a vigorous popular music scene, many painters both amateur and professional and more practitioners of the other fine arts than is typical of rural British Columbia. By and large, though, the products of local artists are intended for local enjoyment rather than sale to visitors. At performances, Valley audiences tend to be out of all proportion to the size of the population.

In the USA, it has commonly happened that amenity destinations have combined natural beauty with educational institutions, such as the institutes in Santa Fe, New Mexico and Aspen, Colorado or the small university in Bozeman, Montana. In the Bulkley Valley there are two regional community college campuses, one in Smithers and the other in Hazelton. Yet a reputation for high educational attainment does seem to figure in the special character of this part of the world. All over northern British Columbia one hears the 'rural myth' that Smithers has more PhDs per capita than any other part of Canada. And indeed, there is a grain of truth to

this notion, in that the Canadian census records relatively high numbers of residents who possess post-baccalaureate degrees. Doctors and scientists have a way of staying here when they retire or have their jobs removed from under them. Some of them move here when they retire.

Networks of well-educated people may account for another sort of cultural amenity, local environmental awareness. Natural resource projects are seldom uncritically given the bye in the Bulkley Valley. Although formal environmental organizations have never been strong here, informal networks of passionate, experienced and knowledgeable people spring up almost instantly when announcements are made about potentially destructive dams, mines, roads, forestry or commercial ski proposals. Admittedly these networks often fail to halt the industrial juggernaut, but news about their involvement in planning probably cultivates interest among susceptible listeners or viewers in distant places. One has the impression that most of the environmental activists are amenity migrants by origin.

The Bulkley Valley floor is occupied by an attractive mixture of small-scale ranches, hobby farms and rural residential properties. Old Hazelton (pop. 370) looks a little like the 19th century silver-mining and steamboat town it once was, and it has a superb setting at the junction of two big rivers below majestic Hagwilget Peak. Telkwa (pop. 1400) is a quiet, pretty village with riverbank walks, restored houses and business frontages and low housing costs. Houston (pop. 3600) is home to what is billed as the world's largest sawmill. It is sufficiently industrial in character that some of the people who spend their days working there commute from Smithers.

Most amenity migrants first settle in or around the town at the heart of the Valley, Smithers (pop. 5600). Smithers has a reputation for looking alpine and picturesque on account of the glacier-hung mountain towering 2100 m over it and its Swiss-imitative downtown facades. It is also where the non-native musicians and painters concentrate. Here, old-fashioned neighbourliness somehow comports with two or three hundred well-educated consultants and government employees – exactly how many in these times of flux is impossible to say. Here too, sense of community identity is very strong, growing out of iso-

lation, a widely shared conviction that this is one of the best places in the world in which to live and love of the outdoor life. Nature is highly salient for townspeople. From Main Street it is sometimes possible to see mountain goats on the alpine meadows high overhead and bears on nearby bluffs. In winter the moose become so tame that householders throw snowballs to chase them away from fruit trees.

In turn, the salience of nature has created an outdoor culture. Nearly everyone skis, hikes, fishes, snowmobiles or mountain-bikes. Local children win national cross-country ski competitions. People in their eighties make mountain crossings involving 1700 m of relief. At times, the town of Smithers has managed the regional-scale local downhill ski operation.

Although most of the land on the Valley bottom, perhaps 80%, is privately owned or leased from the provincial government, everything above it is Crown forest and open to recreational use. Hence freedom and spaciousness are powerful incentives to take up or retain residence in the Valley. When the Wet'suwet'en and Gitksan settle their land claims they will gain fee simple and other kinds of ownership of some of the Crown land, but at the moment their holdings are confined to reserves totalling not more than 1% of the district.

In 2003, as was the case with other hinterland districts of British Columbia, the Valley needed an economic impetus. For at least a decade employment from logging had been slowly diminishing, but within the past 2 or 3 years it had plunged, in the Hazeltons catastrophically. The election of a new provincial government had led to extreme downsizing of the local civil service, combined with centralization of some offices right out of the region. Many of the consultants, dependent on government contracts, left too. For the first time in memory, town populations stopped growing. Indeed, they started diminishing. Between two annual issues of the district telephone book, more than a thousand names disappeared from local listings for the Hazeltons, according to the mayor of the village of Hazelton; and there were only two or three thousand to start with.

In 2003 also, Smithers was emerging from an unsatisfying experience with a resort developer. A large American-owned firm, Canadian

Rocky Holdings Ltd, had made an offer to buy the local downhill ski operation, provided its plans for massive expansion and residential development were approved by an agency of the provincial government, BC Assets and Lands. Explaining his company's plans to 'stakeholders' in the community, executive Jim Anthony professed to be attracted by the remoteness, rural character, warm community and tranquillity of the area. Although Rocky Holdings' proposal would have resulted in virtually a new town hanging above Smithers, drastically changing local viewscapes, society and economic life, the town of Smithers and most of its citizens supported it. For its part, the new provincial government ensured that very lenient environmental assessment processes were applied to the proposal. Nevertheless, for reasons never fully made public, Canadian Rocky Holdings' plans fell through.

Despite the economic distress, there was no reason to think that Valley residents would embrace amenity migration uncritically. Here, as elsewhere in the interior mountain communities, amenity migration was invisible as an economic development force. Among longer-term residents in particular, conservative and suspicious habits of mind can be so strong as to override even self-interest, and municipal officials warned against hastiness. At the first Bulkley Valley meeting concerned with planning for amenity migration, held in Smithers in October 2003, planners and administrators urged the author to conduct preliminary studies to ascertain what proportion of the Valley residents had come as amenity migrants themselves, and to gather certain other data preliminary to understanding what might happen if amenity migration were increased through conscious intervention. Local mayors and councils wanted to maintain distance between themselves and planning for amenity migration until they knew more about it, until their electorates had developed some understanding of it and until it became clear how their electorates would feel about it. Research by an academic from the regional university, the University of Northern British Columbia, might accomplish all of these desirable things.

Of course academic research must have a theoretical component, however desirable its

practical applications; and sources of funding for community-based academic research are not easy to find. Fortunately, the Real Estate Foundation of British Columbia was willing to fund a programme of research of this kind.

The first study took place in spring 2004, and besides contributing towards the goals of the municipalities and the development of theory, it had an unexpected outcome. In a region of North America where residents are very disinclined to respond to questionnaires, and where academic research is often dismissed as foolish and irksome, 820 households responded to a survey on residents' origins, reasons for coming to the Bulkley Valley, economic and demographic characteristics and related matters. Another reason for surprise at the number of returns was that the municipalities bulk-mailed the questionnaires as flyers to the roughly 8000 households on their mailing lists. Consequently, many of the questionnaires were screened out by junk-mail filters at the post office or never given a second glance. Finally, the one-in-ten response rate was obtained without telephone requests for cooperation and without reminders of any sort. With 8000 mail-outs, telephoning and follow-up efforts would have been prohibitively expensive.

Additional signs of support for research into amenity migration as a means of community development were evident in the fact that returned questionnaires often included gratuitous comments expressing love for the Valley or strong approbation for the idea of planning to increase amenity migration. The local newspaper ran several articles on the subject. The regional radio station carried interviews with immigrants. Everyone seemed to be talking about amenity migration as something which was obviously going on but whose economic implications had been unsuspected. Awareness of the enthusiastic reaction to the survey seemed to heighten the Valley sense of identity, confidence and vitality. If so many other people were finding their way to the Valley as individuals, people appeared to believe, then home really was a special place, one worth both promoting and preserving.

Results from the survey portrayed a population to which amenity migration had already made a large contribution, without conscious

effort on the part of local or provincial authorities. Natural amenities and recreational opportunities dependent on natural amenities were among the top reasons for in-migration (Table 11.1; preliminary results based on 810 returns). For example, 'To enjoy clean rivers and lakes' was Very Important as a reason for in-migration to 65% of respondents who had come to the Valley as adults, and either Very Important or Somewhat Important to an astonishing 90%. Similar results were found for 'To be near abundant outdoor recreational opportunities' (Very Important 57%, either Very Important or Somewhat Important 88%); 'To be near wild country' (55%, 87%); 'To enjoy clean air' (55%, 86%), and so on.

Cultural or social amenities were principal attractants too, especially 'To live in a good community' (65%, 89%) and 'To be in a safer place' (35%, 57%). However, they tended to be selected less often as Very Important and more often as

Somewhat Important: 'To enjoy the lively music or cultural scene' (25%, 32%); 'To be in farm or ranch country' (23%, 38%). 'To be close to family' was Very Important to 18%, Somewhat Important to 17%.

The economic reasons conventionally thought to account for population movement to places like the Bulkley Valley certainly figured in people's location decisions too, but the extraordinary thing is that so many in-migrants were little affected by them. 'For a new job' was a Very Important motive in the case of just 63% of in-migrants. As either Very Important or Somewhat Important, it figured in 79% of cases, making it the reason sixth most often registered by in-migrants. 'To have a lower cost of living' was Very Important to a smaller though still substantial percentage (23%), though Very Important or Somewhat Important to more than half (56%). 'To pursue a business opportunity'

Table 11.1. Some reasons for migrating to the Bulkley Valley.

Reason (Very Important)****	Results from a survey of 810 residents Amenity migrants*	Job migrants**	Business migrants***
Clean rivers and lakes	67%	54%	65%
Good community	62%	58%	59%
Wild country	58%	47%	61%
Clean air	58%	43%	54%
Outdoor recreation	53%	51%	57%
Safety	32%	28%	33%
Music and culture	26%	16%	24%
Ranching and farming country	23%	18%	32%
Fishing	21%	31%	38%
Climate	21%	18%	33%
Back-country skiing	20%	14%	15%
Parks	19%	17%	19%
Cost of living	18%	22%	31%
Retirement	17%	8%	14%
Downhill ski facility	15%	19%	24%
Business climate	13%	8%	15%
Snowmobiling	6%	8%	15%

*Amenity migrants here are resident migrants who indicated no economic reason for migrating was Very Important to them.

**Job migrants here are resident migrants who indicated a job was Very Important as a reason for migrating.

***Business migrants here are resident migrants who indicated a business opportunity was Very Important as a reason for migrating.

****Reasons for migrating here are reasons informants indicated were Very Important in their decision to migrate.

was Very Important to 20%, Very Important or Somewhat Important to 34%. When overlap of reasons is taken into account, it appears that roughly one-fifth of the in-migrant population of the Valley had no strong economic incentive for their move.

A stereotype of the academic literature on amenity migrants is that they are wealthy. Perhaps they are elsewhere, but not in the Bulkley Valley. Mean annual income for migrants wholly unmotivated by economic incentives was about CAN\$42,500, versus about CAN\$65,500 for emphatically economic migrants and CAN\$66,800 for natives of the Valley. Perhaps the explanation for the lower mean income of the amenity migrants is that so many of them are young. Perhaps the reason why amenity migrants fit so well into Valley society is that most of them cannot be resented for their affluence.

Amenity migration is often thought to be synonymous with the movement of retirees. It was therefore unexpected to find that 'To retire' and 'To prepare for retirement' were among the lowest-ranked reasons for coming to the Valley. Each was Very Important to merely 15% of in-migrants. 'To retire' was either Very Important or Somewhat Important to 28%. 'To prepare for retirement' was either Very Important or Somewhat Important to 36%. Despite these modest showings, it remains possible that much of the truly discretionary movement into the Valley can be attributed to persons retired or retiring.

By this point, work on planning for amenity migration to the Valley had acquired a formal-sounding but non-institutional name: the Bulkley Valley Planning for Amenity Migration Initiative, or BV PAMI. When a second meeting of planners and administrators took place in Telkwa in April 2004, BV PAMI started to take more concerted action. Administrators and planners asked their UNBC collaborators to prepare research reports displaying results that would be readily understandable to their mayors and councils, regional chairs and boards of directors, and senior managers. These reports could be in newspaper opinion-editorial format, indeed prepared for distribution to local news media, but they should be made available to the administrators and planners about 2 weeks before publication, to

permit the politicians to read them, assimilate them and know how to respond to questions about them.

The BV PAMI group also asked that as each component of the planning for amenity migration research project was completed, UNBC researchers should provide administrators, planners and managers with recommendations flowing from the studies. The BV PAMI group would then, acting as a whole, select the recommendations appearing most valuable and politically feasible. Individual administrators, planners and managers would take the packages of selected recommendations back to their political decision makers and advocate on their behalf.

To this point, there had been essentially no opposition to the idea of planning to promote and manage amenity migration. A potentially unwelcome, divisive and highly political issue had apparently made a 'soft landing'.

In June 2004, the next stage of the BV PAMI research project and community action initiative was the deployment of the first of two or three citizen juries to provide lay, disinterested guidance on whether or not planning for amenity migration would be a good thing for the Bulkley Valley, and if so, what its characteristics should be. The citizen jury, closely allied to or an offshoot of the consensus conference, is a relatively new kind of planning process. Up to a dozen quasi-randomly selected citizens are briefed on a technical issue, normally on a weekend, then asked to deliberate on certain questions (e.g. Konisky and Beierle, 2001). On the following weekend, they make their decision and present it to the community, news media and experts in the subject. BV PAMI researchers and group members felt that citizen juries would be appropriate to a planning for amenity migration initiative because most Valley residents still had little or no idea of what amenity migration is, what its positive and negative qualities might be or how it might be promoted and controlled, and citizen juries would help disseminate information on these topics. They would also take some of the responsibility for decision making off the shoulders of the political leaders of the community or at least create distance between amenity migration planning and the leaders, while the leaders had time to think

the matter over and to see which way the wind was blowing.

The first Bulkley Valley citizen jury on amenity migration had seven panel members chosen from among survey respondents who had replied positively to a question asking whether they would be willing to give further assistance to research on amenity migration. They were broadly representative of the population distribution in the central portions of the Valley and of migration history, though not necessarily of any other demographic variables. They were expected not to have any personal reputation for stakeholder representation in other planning processes.

The Smithers–Telkwa citizen jury delivered verdicts on several questions put to it by two UNBC School of Environmental Planning researchers, the present author and Dr Eric Rapaport. Question 1, the most important, was ‘Should the Bulkley Valley make efforts to increase amenity migration to this area?’ On it, the jury gave a resounding ‘yes’ decision. Question 2 asked ‘If the answer to Question 1 is “yes” how much amenity migration would be good for the Valley?’ Here the answer required a good deal of deliberation, though it too emerged as a consensus view: the Valley should attempt to attract just enough new migrants to keep population levels stable, plus a very small amount of growth. Question 3 asked ‘If the answer to Question 1 is “yes” from what sources should the Valley try to draw migrants?’ In reply, the jury decided that migrants should be drawn from a broad range of sources, but by preference from people who had a realistic appreciation of what life in the Valley is like. Questions 4 and 5 were concerned with fairly specific aspects of planning: where amenity migrants should be encouraged to settle and what kinds of planning were appropriate to a strategy to promote and manage amenity migration.

It should be noted that well into the decision-making portion of the jury process, members of the Bulkley panel were asked to respond to a supplementary question individually. That question was a Likert-type item asking for a judgment about how similar second-home ownership is to permanent residency from the point of view of desirability to the existing community. On a five-point scale in which 1 was Very Different and 5 was Very Similar, the mean response was 1.2.

Hence in the jury’s decisions second-home ownership was NOT included in the definition of amenity migration.

At time of writing, teams of citizen jurors and researchers are presenting summary accounts of the Smithers–Telkwa jury process to the mayors and councils of Smithers and Telkwa. Stories about the jury appeared in the local newspaper and in a very minor way the jury prompted questions at a town hall meeting featuring local candidates for Parliament in the 2004 federal election. After additional citizen juries have been held in the north-western and south-eastern portions of the Bulkley Valley, a full account of procedures and results will be published in academic journals.

If all three juries deliver verdicts affirming the desirability of promoting amenity migration through planning, municipalities and local offices of provincial government agencies may start implementing planning measures to increase amenity migration to the Bulkley Valley and manage it. Although it is too soon to say what those measures may be specifically, some idea of the possibilities is provided in a report by a commission of the State of Florida, mentioned earlier (Destination Florida, 2004), and in Blakely and Bradshaw (1985), Fox (1995), and Severinghaus (1990). To promote amenity migration, the Destination Florida Commission recommends, for example, the designing of a marketing plan to attract amenity migrants, improving the conditions for quality of life as seen by migrants, targeting tourists, encouraging editors of out-of-state publications to publish stories about Florida, participating in appropriate conventions, establishing a Speakers’ Bureau to spread the word about state amenities, developing an ‘ambassadors’ programme and increasing the scope for volunteer participation in the management of parks and conservation areas. Control over amenity migration can be achieved through, for instance, official community plans facilitating rural residential subdivisions only in places where they will have the smallest environmental impact or the most beneficial effects on the sustainability of existing development. Careful advertising or other kinds of promotion may encourage particular sorts of amenity migrants, such as young people, or discourage other sorts, such as the wealthy who would occupy their homes for only part of the

year. Needless to say, both promotion and control will be dependent on adequate monitoring of the flows of in-migrants and careful evaluation of the effects of different planning measures.

Theoretical research will also continue on amenity migration to the Bulkley Valley. During late summer of 2004, a University of Northern British Columbia graduate student began work on a survey to clarify causal relationships between nature-based tourism and amenity migration to the Valley. Currently almost nothing is known about these relationships except that rates of tourist visitation and amenity migration are both fairly low and anecdotes suggest that more migrants learned about the Valley through word of mouth, through work experience and through chance than through tourism. Studies by UNBC faculty researchers are commencing on current rates and sources of amenity migrants, second-home buyers and movement into, out of and within the Valley.

Some of the foundational authors in the field of amenity migration firmly link tourism and second-home ownership to amenity migration (e.g. Moss, 1994; Glorioso, 1999; Moss and Glorioso, 1999) via the 'amenity migration paradigm'. (See also Stewart, 2002.) At present there are no data on whether tourism and second-home ownership are significant causal factors in amenity migration to the Bulkley Valley and other little-known mountain communities of north-western North America. To put it another way, at this point there is simply no empirical basis for testing with data from the Bulkley Valley whether the amenity migration paradigm applies to all or just some amenity destinations. However, such data should be available soon.

Conclusion

In summary, amenity migration is well established in the mountainous interior of British Columbia, but until very recently it has happened without much local awareness of its extent, of how large a contribution it makes to district economies and community life or of the possibilities for promoting and managing it. In at least one district, the Bulkley Valley, survey evidence has determined that a high proportion of residents can be considered amenity migrants to one degree or another and that natural amenities have been principal motivators in attracting them. Survey findings from this one case also raise the intriguing possibility that amenity migration to little-known, out-of-the-way communities may be quite different in nature from amenity migration to the famous, fashionable places. On average, amenity migrants have not larger but smaller annual incomes than do economic migrants and lifelong residents.

The experience of the Bulkley Valley indicates that bottom-up planning for amenity migration can benefit from close collaboration between community officials such as planners, administrators, politicians and agency managers, on the one hand, and academic planning researchers on the other. Academic research on the characteristics of 'natural' amenity migration in a particular place has the effect of raising public consciousness about local amenity migration at the same time as it enhances knowledge of the economic and social implications of such migration. Participatory action research can take what for most members of the public is an unknown quantity and in the space of a year or so make it an exciting new way for a community to see and sustain itself.

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12 A Brief History of Amenity Migration in the Adirondack Mountains

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Introduction

April 23, 2004 – Governor Pataki of the State of New York announced the largest land conservation arrangement in the history of the Adirondack Park. More than 1012 km² of land owned by the International Paper Company will be preserved by the State of New York through a combination of easements and purchases. Environmental leaders and state officials praised the arrangement, citing the new recreational opportunities that would become available to outdoor enthusiasts, while International Paper would continue to be able to harvest the land, for the benefit of its Adirondack-based mill. A spokesperson for the Adirondack Mountain Club, one of several environmental advocacy groups in the Adirondacks, said that the agreement would ‘...eliminate the potential for second-home development...’ (Press Republican, 2004).

Thus began another in a long line of land acquisitions and arrangements whereby the State of New York preserves more land for recreation in the East’s largest forest preserve – the Adirondack Park. A park without a gate, the Adirondack Park encompasses some 24,281 km² of public and private land. When it was created in 1892, it was conceived as ‘The Central Park of the East’ – a forest preserve located in the (then) most populated state in the USA. This latest conservation move, in light of previous acquisitions, existing statutes and economic forces, has impli-

cations for the region that have yet to be determined. More importantly, when combined with the growing force of amenity migration into the region, communities can only expect to see increased pressures on budgets, infrastructure, workforce and residents. This paper examines the history of the Adirondack Park and how amenity migration has affected, and will continue to affect, the Park and its communities.

The Adirondack Mountain Region

The Adirondack Mountain Region consists of 12 counties in upstate New York (Fig. 12.1). This area is north of the New York Thruway and bounded on the west by Lake Ontario and the St Lawrence Valley, the north by the Canadian border and the east by Lake Champlain and Vermont (APA, 1982).

Geology and Ecology of the Adirondack Mountains

The Adirondack Mountains were formed some five million years ago, as a result of tectonic forces raising much older rocks underlying an ancient seabed. Carved by glacial action, the Adirondacks stand alone as a unique biosphere (recognized by the United Nations as a World Biosphere Reserve). Although the Adirondacks lie just west

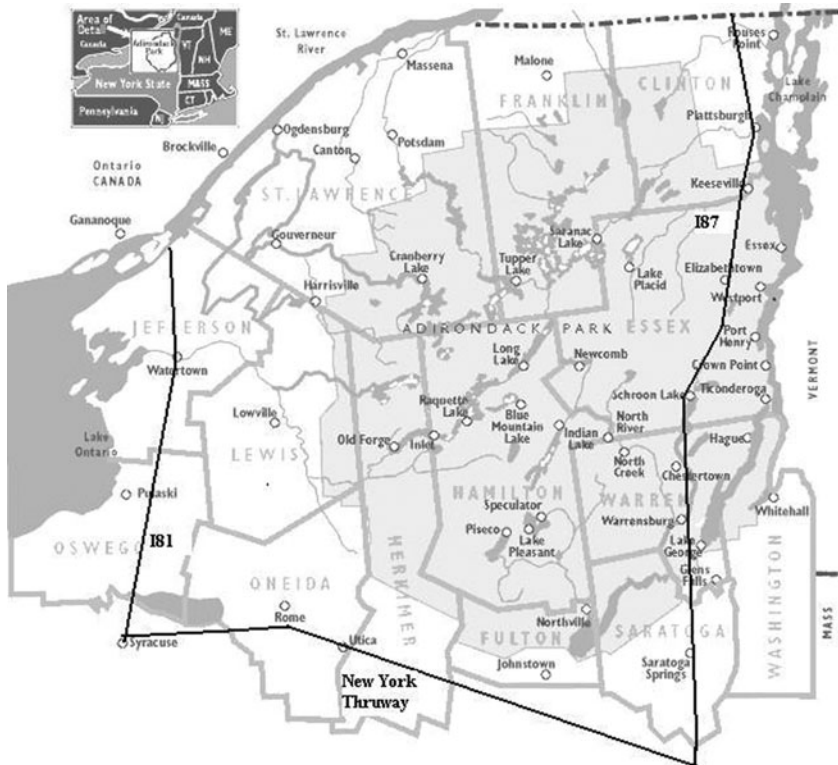


Fig. 12.1. Map of Adirondack Park Region. Source: AEDC (2004).

of the northern ranges of the Appalachian Mountains, they are linked geologically to the Laurentian highlands of Canada. Elevations of its 100 peaks vary from approximately 366 m to more than 1524 m. The mountains are further defined by 2000 lakes and ponds and 49,900 km of streams and rivers (APA, 2004). This region is the largest remaining temperate-deciduous forest in the world. Forestlands range from pine and northern hardwoods to sub-alpine spruce and fir to alpine tundra. As the largest old-growth forest east of the Mississippi, some areas within the Adirondack Park have trees hundreds of years old (Houghton College, 2004).

The History of Adirondack Park

The creation of the Adirondack Park started in 1885 when the New York State legislature, con-

cerned about unregulated logging and its impact on downstate waters, designated state forestlands in northern New York as protected Forest Preserve. Subsequently, in 1892, the Legislature enlarged the Preserve and created the Adirondack Park. In 1895, the Legislature again acted to protect public and private forestlands by amending the 1892 statute with a clause that remains law today:

The lands of the state, now owned and hereafter acquired, constituting the Forest Preserve, as now fixed by law, shall be forever kept as wild forestlands. They shall not be leased, sold, or exchanged, nor shall the timber thereon be sold, removed, or destroyed (Adirondack Museum, 2004b).

Although the state continued to purchase parcels of private land, development also continued within the Park boundaries. After The Second World War, tourism in the Park increased, and downstate and out-of-state residents began to buy land and

build second homes and seasonal cabins. By 1967, with the completion of the Interstate Highway 87 (I-87) between Albany, New York and the Canadian border south of Montreal, the environmental community and state government started to become concerned about increasing real estate development and its impact on the Park's natural resource assets (APA, 2004).

In 1968, a commission was formed to consider options for protecting the Adirondack Park. As a result, in 1971 the Adirondack Park Agency (APA) was created. The APA's mission was to develop land-use plans for both public and private land within the Park boundary. The State Land Master Plan was adopted by the APA and became law in 1972. In 1973, a subsequent Land Use and Development Plan was instituted for private lands within the Park. The Land Use and Development Plan created 15 land classes: six for private lands, eight for public land and a ninth category to identify land not yet classified (APA, 2004). Land use in these classes ranges from high development intensity in hamlets to low intensity in wilderness (Table 12.1). High-intensity land use, such as in hamlets, has an unlimited number of principal buildings per square mile and no average lot size. Outside of the hamlets and in low-intensity-use areas, the average lot size must be 12,950 m² to as large as 172,801 m².

Shoreline restrictions provide for lot width and setback distance from the water line. With a

minimum lot width as small as 15.24 m in the hamlets, the Land Use and Development Plan permitted significant development along many of the Park's shorelines (Fig. 12.2). By the 1980s, water pollution from runoff and overbuilding was at such a critical level that the Governor took action by appointing a new commission to re-examine the APA and the original statutes. Although the commission made numerous recommendations for reform of the statute, including addressing the impending damage to shorelines and water quality, the Legislature was not able to pass any of the proposed bills (Adirondack Museum, 2004a).

The APA provides land management, while the State Department of Environmental Conservation (NYSDEC) controls state recreational and conservation land use. The result is a geographic region that largely has retained its 'wildness', while at the same time transitioning to new economies as the older economic engines of forestry, wood products, mining and the tanning industries declined.

Geo-political Setting

Today's Adirondack Park encompasses a region that includes two entire counties, significant parts of ten others, 105 towns and villages and numerous unincorporated hamlets. The Park

Table 12.1. Land classes in the Adirondack Park.

Ownership	Class	Development intensity	% of Park
Private	Hamlet	High	0.92
	Moderate intensity	Moderate	1.75
	Low intensity	Moderate	4.64
	Rural use	Low	17.45
	Resource management	Low	26.69
	Industrial use	High	0.21
Public	Wilderness	Low	18.40
	Canoe area	Low	0.30
	Primitive	Low	0.78
	Wild forest	Low	22.14
	Intensive use	High	0.34
	Historic	High	0.01
	State administrative	High	0.03
	Pending classification	n/a	0.60
	Water	n/a	5.75

Source: APA (2004).



Fig. 12.2. Second homes along the shoreline of Saranac Lake, Adirondack Park, New York, USA (photograph: W.R. Glass, June 2004).

comprises approximately 24,281 km² of scattered public (roughly 48%) and private land. Communities within the Park are about a 5-h drive from New York City, and within a day's automobile drive of approximately 65 million people.

With the APA as the single land-use agency in the Park, local jurisdictions have adopted various levels of land-use and zoning regulations. These tend to either complement or defer to the APA regulations. The Park region spans seven State Assembly districts, four State Senate districts and three federal Congressional districts. There is no single entity responsible for development efforts within the Park region, although the state's Department of Economic Development has responsibility throughout the state. But the Park also includes three different state development regions, each with a responsibility for an area that includes non-Park lands.

This split of responsibility by state economic development offices results in a policy conflict, as state agencies attempt to meet the needs of constituents with differing expectations and concerns. For instance, there has been a move at the state level to curb 'sprawl', a condition that manifests itself in very different terms within the Park than

in urban/suburban areas elsewhere in the state. But typical regulatory policy would dictate 'one size fits all' when it comes to limiting sprawl. State offices must then attempt to apply these regulations uniformly inside and outside the Park, to the possible detriment of communities pursuing already limited development opportunities.

The Adirondack Economy

The region was initially settled and exploited for its natural resources: forest products, water, minerals and fauna. Early forests were exploited, with no regard for reforestation. The region's mineral resources, which included zinc, garnet, graphite and iron, were similarly exploited, leaving several areas of scarred spoils. The tanning industry flourished for a period, supported by both the abundance of animals such as beaver and the availability of tannin. As these historical industries declined in importance through the early part of the 20th century, no new natural-resource-based industries emerged to replace them. Some mineral extraction remains and managed forests have replaced the previous barren

mountainsides. Briefly in the late 20th century, a foray was made into the biological sciences in the Lake Placid (Essex County) area, but this has not proved to have any local growth potential. Communities created business parks but found few takers for the locations, especially in the more remote central areas of the Park. Land-use regulations limited the types of industries that could be located, but this seemed to be less of a problem than workforce availability and geographic distance to major markets.

The tourism industry (discussed below) surfaced as a source of economic stimulus for many communities, albeit with seasonal limitations. Today, tourism remains the number one private employer in the region. Forestry and some agriculture contribute to the mix, complemented by government investment in prisons and social service programmes.

Transportation and Communication

The region's rivers proved very conducive to forestry until that industry had completed its earlier cycle. Dams were built along most major rivers to accommodate both the movement of timber and the mills that were fed by forest products. Villages and hamlets developed in many of these areas. All that remains of the old mills are foundations: low-head hydroelectric has replaced some of the original mill dams. The region's rivers also contributed to early tourism development, as cruise ships transported visitors from railheads to exclusive resort areas deep in the wilderness.

Rail lines were built for mineral extraction and tourism development. However, the rail lines have essentially disappeared over the past century, with the exception of short line excursion trains. Remaining rail right-of-ways have been converted either to tourist train use or for hiking, biking and snowmobile trails. Well-maintained state highways and locally maintained roads traverse the region, although there are pockets of communities that have limited access to major transportation routes. Interstate Highway 87 between Albany and the Canadian border travels through some of the most pristine topography in the region. It has proved a boon for the gateway communities of Plattsburgh, New York (Clinton County) in the north and the communities north

of Albany. The benefits have been slower to come to communities in the Lake Chaplain Valley, lying just east of the Interstate, or to those central Adirondack communities that lie as much as 2 h from any interstate highway. Even development along the interstate has been limited; there are still significant stretches without any services other than state-run rest areas.

The lack of access to broadband technology has long been indicated as a limiting factor to further development of the Park region. Fibre-optic lines are buried along Interstate 87 and the north-south rail line that runs along Lake Champlain, but little has been done to extend this resource into the interior of the Park. An initiative was started in the late 1990s to create a local development authority for fibre in St Lawrence County and the Watertown area. A similar effort is planned for the north-east counties of Clinton, Essex and Franklin. But the opportunity for extensive broadband development into the interior communities is limited to those that can afford it. Lake Placid, for instance, has broadband capacity, due to the Olympic venues and the requirements of the news media covering athletic events. Colleges and some industries have paid for high-speed access to meet their needs, but the service is not economically feasible for the major telecommunications companies serving much of the region. Similarly, cell phone service in the Park is limited to areas around villages and some hamlets. APA regulations specify tower height and design, and sparse population makes the installation of a system of widespread cell service infeasible. Local communities and conservationists have resisted siting of towers, fearing degradation of scenic vistas. This has its implications for both local residents and those visitors to the region who might expect access to both broadband and cell services.

Demographic Trends in the Adirondacks

The Adirondack Park has a population that has, at best, remained stagnant over the past 20 years (MRSI, 2004). Few studies have been completed about demographic shifts in the Park, due, in part, to the difficulty in delineating those towns that straddle the Park's boundary. The largely seasonal

population in many towns also poses a challenge to accurately determining the Park's population, which may swell to several hundred thousand (not including transient visitors) during the summer season. The most recent estimate of year-round population was completed by the New York State Data Centre, using Census 2000 data. This study estimated that the Park itself had 131,807 residents (New York State Data Centre, 2004).

All but four of the counties in the region experienced population growth between 1990 and 2000. Of the four counties that experienced population decline, two (Clinton and Oneida Counties) were due largely to military base closures. Hamilton County, the least-populated county in New York, has a population of only 5379 (MRSI, 2004). Population growth or decline is consistent to the geographic location of the communities. Those on the perimeter of the Park (particularly on the southern boundaries and near Plattsburgh to the north-east) experience growth, while the more remote regions of the Park experience stagnant or declining growth (Jenkins, 2004). Hamilton County has the largest percentage of seasonal housing of all the counties, at 65.4%. The other 11 counties' seasonal housing exceeds the state's rate of 3.1%, ranging from 5.3% to 26.5% (MRSI, 2004).

The region has traditionally ranked highest among the state's non-metropolitan areas for both poverty and unemployment. Unemployment varies seasonally, but typically exceeds the state's rate for all counties except Oneida, Saratoga, Warren and Washington (MRSI, 2004). Seasonal rates are in the double digits for Hamilton County and portions of other counties that are reliant on the tourism industry. Pockets of poverty exist throughout the Park. As defined by the federal Certified Financial Development Institution (CDFI) criteria, there are dozens of federally defined census tracts that meet or exceed the CDFI criteria (US Treasury CDFI Program, 2004). For an area to be considered CDFI-eligible, it must meet several criteria. The percentage of the population living in poverty must be at least 20%, the median family income must be at or below 80% of the state-wide non-metropolitan median family income and the unemployment rate must be at least 1.5 times the national average. Median age in the region is also high, with all 12 of the region's counties having a median age

greater than that of New York State (35.9 years) (MRSI, 2004). Hamilton County, one of only two counties totally inside the Park, has a median age of 45.4 years (MRSI, 2004).

The plight of the communities in the Park is well known. In a report in *Adirondack Life Magazine* (March/April 2003), it was reported that 'Social service agencies wrestle with poverty-related problems – domestic violence, illiteracy, substance abuse, inadequate housing – at rates usually associated with inner cities' (Mann, 2003: 50).

Amenity Migration in the Adirondacks

It is only within the last 2 years that the term amenity migration has been discussed as a local phenomenon in the Adirondack Mountain Region of northern New York State. Although recognized for some years in the western USA and elsewhere, the immigration of new residents due to the attraction of amenities had not been formally studied or named. The growth in second-home construction and the transition of small communities to a predominance of non-residents had been observed and anecdotally reported. However, a review of the history of the Adirondack Mountains reveals that the region has, traditionally, been a place of migration (and property ownership) as a result of the amenities the region has to offer.

The Past

Prior to the creation of the Park, the Adirondack Mountains provided the backdrop for much of the early land-barons' acquisitions in the 18th and 19th centuries. In the late 1700s, land was acquired in large tracts by New York City residents for as little as 3 cents per 4047 m² (Adirondack Museum, 2004d). Later sales of land by the state to collect unpaid property taxes provided an opportunity for more speculation and logging, leading to additional defaults on tax payments and further sales. Those previously logged and unsaleable parcels retained by the state were the early beginnings of the Forest Preserve (Adirondack Museum, 2004d). Subsequently,

the late 19th century witnessed an increase in the demand for land, as the state continued its purchases of forest, and logging companies sought new tracts for pulp and other timber products. It was during this time that the region first began to emerge as a tourist attraction as large tracts of land were acquired for resorts, private camps and speculation. By 1893, there were 45 private preserves in the Adirondacks. These holdings retained in private hands tracts as large as 320 km² (Adirondack Museum, 2004d). By this time, land prices had soared to as much as US\$10 per 4047 m² (Adirondack Museum, 2004c).

Entering the early 20th century, the region was hard hit by the Great Depression, which resulted in mill closings and declining property values. Resorts and large luxury hotels that had catered to the elite from New York City, Boston and other East Coast cities were forced to close. The trend persisted through The Second World War. With the post-war boom came a renewed interest in the Adirondacks through tourism and vacation-home building (Adirondack Museum, 2004d). It was during this time that development moved away from large resorts to smaller, more practical 'motels'. Larger resorts and private preserve properties, as they became available, made for excellent residential home lots. Anecdotally, it is reported that the Park now has half the rentable rooms that it had in the early part of the 20th century (CAST, 2003). Very few of the old great

camp, preserves and resort properties remain, as many have already been subdivided for primary and second homes. Examination of data from the towns within the Park would indicate that many of these homes are for seasonal residents (AEDC, 2003). Other heirloom properties, like the Debar Lodge in the Town of Duane in Franklin County (Fig. 12.3), were on leased state land, which, when the lease expired, reverted to state control.

The region was, at one time, home to numerous ski areas. But by 2004, the New England Lost Ski Area Project (NELSAP) records 28 closed or abandoned ski areas in the Adirondack region (NELSAP, 2004). At present, only six public ski facilities remain open. The decline in ski areas is consistent with the increasing pressure on those facilities from corporate-owned ski resorts, land restrictions and the changing economics of the industry.

Despite the restrictions of the APA's Land Use Plan, sales of land during the 1980s skyrocketed. Between 1982 and 1985, subdivided land sales tripled. By 1988, they had doubled again (Adirondack Museum, 2004a). The increase in land prices encouraged the subdivision of larger tracts and the expansion of development in largely unregulated shorelines. National hotel chains moved into the most profitable areas of Lake Placid, Lake George (Warren County) and Old Forge (Herkimer County) (Adirondack Museum, 2004a). These communities were devel-



Fig. 12.3. Debar Lodge, one of the few remaining 'heirloom' camps, Adirondack Park, New York, USA (photograph: W.R. Glass, March 2004).

oping into strong seasonal tourist attractions. By the 1990s, Lake Placid had become a nearly year-round resort community, attracting tourists, permanent residents seeking the region's recreation and natural beauty, and second-home owners. Even at this time, rising land prices, exacerbated by purchases for second homes, were affecting local year-round residents' ability to find affordable housing (Adirondack Museum, 2004a).

The Present

The current situation for amenity migration is one of coping for the Park's communities. Continued building has created its challenges – overloaded wastewater and drinking water systems, traffic, demand on recreational infrastructure and concern for sustaining natural resources. Several issues have emerged as examples of the challenges faced by local communities.

In the hamlet of Old Forge, located in Northern Herkimer County, homeowners with properties on First Lake complained to the town supervisors in 2002 of increasing noise and wake from jet skis, which led initially to a ban on jet skis during certain hours. A lawsuit followed, challenging the ban on grounds of age discrimination (youth were prohibited from riding jet skis) and complaining that the time restrictions were a hardship on those second homeowners who travelled after work to their cabins and thus arrived too late to ride their jet skis. The irony is that many of those who initially complained about the jet skis were, in fact, seasonal residents or year-round migrants themselves (CAST, 2002). Amenity migrants are hoping to maintain some of the peace and beauty that brought them to the community initially. Other communities have also banned jet skis or personal watercraft due to similar complaints.

In a similar vein, conservation groups have challenged the state's position on snowmobiles, fearing that future environmental damage will result if trail systems are permitted to lengthen and the trails themselves to widen. Yet for some of the Park, snowmobiles are the only means to assure even a minimal income for businesses during the winter months. The snowmobilers complain that it is 'our Park, too', alleging attempts to

effectively ban snowmobiles from public lands. The potential impact of snowmobile bans was felt briefly in 2002, when insurance carriers providing insurance for local snowmobile clubs dropped their coverage due to rising costs. Many of the snowmobile trails are maintained by the clubs, which must provide liability insurance. For a period of time, until the problem was resolved, communities that had traditionally relied on the snowmobilers for their economy were without that revenue. This episode illustrated that snowmobiling is not just a transient and seasonal sport. Snowmobilers own property in the communities, even if it is for seasonal use, and local businesses use the snowmobilers' spending as part of their justification for living and operating in the community.

The problems with overbuilding in villages and hamlets have become so serious that some communities have resorted to tougher measures. Lake Placid, due to serious sewage problems during the summer season, denied new building development the right to connect to the village sewage system until the system was upgraded (Mann, 2003). Smaller communities are similarly impacted. Keene, a small hamlet in Essex County, has asked tour companies to reduce the number of groups they bring into the area for hiking, to reduce the impact of both traffic and hikers on roads and trails (Mann, 2003). This action is a double-edged sword. Ultimately, this will impact the community's ability to support its infrastructure, as seasonal businesses (retail, guide services, equipment rentals) are impacted. Although the hikers typically are short-term visitors, restrictions on the use of public resources also affect residents who have moved to the area for enjoyment of the amenities. Their access may also be similarly limited. In an effort to reduce the rapid expansion of new construction along shorelines, communities have resorted to local ordinances. Lake George, for instance, issued a moratorium in 2002 on the construction of new marinas, to reduce lake congestion (Mann, 2003).

Other communities face issues that are less easily solved. Second-home residents are often older, with grown children. As they purchase available homes, there are fewer homes available for young couples with children. The result is a decline in school enrolments, prompting some school districts to close schools or consider

consolidation. This has the effect of further reducing the opportunities for year-round employment and a year-round economy for residents.

It is unlikely that the previously mentioned loss of ski areas has negatively affected amenity migration. The region still has an abundance of winter and summer recreational opportunities and due to its land use controls, some of the most pristine natural landscape in the eastern USA. The state's largest ski area, Whiteface Mountain (Essex County), is ranked as one of the best in the eastern USA. But there is no ski village development at its base, nor will there be. Surrounding land is part of the Forest Preserve and development immediately adjacent to the mountain is limited. This, on the one hand, serves to maintain its pristine character. On the other hand, people seeking residential proximity to Whiteface have to be satisfied with Lake Placid, several kilometres away, or the small hamlet of Wilmington, 3.2 km distant.

The loss of ski areas may actually prove to be contributory to further second-home development. Big Tupper (a presently closed ski resort) in Tupper Lake (Franklin County), for instance, is being considered for extensive development (within APA requirements) that will include condominiums and single-family homes. Developers view this as the only economically viable means to utilize the ski resort infrastructure. Without any other local economic driver in Tupper Lake, the development will encourage amenity migration as it will be marketed and sold primarily to non-residents.

A study conducted for the Olympic Region of the Adirondacks illustrates trends of second-home development and its negative impact on overall housing costs and availability. The tourism industry in Lake Placid and Saranac Lake (Franklin County) had long complained about the lack of affordable housing for seasonal tourism workers, particularly in the summer months, when rentals are at a premium. Paul Smith's College, located in Paul Smiths (Franklin County), also had problems attracting new faculty due to the disparities in the prices and quality of housing versus what recruits from other areas of the country were expecting.

To address these concerns a task force was formed to study the housing issue in the region that includes Lake Placid, Saranac Lake and Tupper Lake. These communities have an inter-related economy based on tourism, medical facil-

ities and the corrections industry. This task force commissioned a research effort to assess both the affordability and the availability of housing in the region. The study consisted of a survey of employers in 13 towns and villages in the region and an analysis of existing housing data. Not surprisingly, housing was identified as a serious problem by the majority of those surveyed. All income levels are impacted with special concern for low- to middle-income families. Both affordability and availability of adequate housing were issues (AEDC, 2003).

The data revealed trends in property ownership that created or impacted housing. When seasonal housing vacancies were compared to total vacancies, the result was a modest increase of only 2.3% in non-seasonal housing vacancies over the 1990–2000 period, compared to a population growth rate in the region of 3.5%. This would indicate that housing had not kept up with the growth in resident population. Five communities experienced an overall loss in available housing, while eight had gains. Part of this loss in housing appears to be due to the conversion of formerly residential property to either second home or seasonal rental use (AEDC, 2003).

Of more concern, perhaps, is the negative impact on housing costs. Only three of the communities in the study had a decrease in their cost of rental housing. In ten of the 13 communities, the cost of housing increased as a percentage of household income. Median home values increased in all 13 communities between 1990 and 2000 (AEDC, 2003). Similar trends have been reported anecdotally in other areas. The Old Forge area (including the Towns of Webb and Inlet) continues to report a lack of affordable housing and its negative impact on younger families and professionals, such as teachers and nurses moving to the area. Some businesses have developed their own housing for seasonal employees, to be assured of their supply of workers (CAST, 2002).

The Future

It seems clear from the Adirondack experience that tourism development and amenity migration are inexorably tied together. As has been seen

elsewhere, repeated visits to an area serve to introduce visitors to its natural beauty and culture, often leading to the decision to relocate to the region on a more permanent basis. From its earliest beginnings, the Adirondack region has attracted people due to its wildness and recreational opportunities. As the region evolved into a more commercialized tourist attraction, people were exposed to the beauty of the region and many decided to make it at least a semi-permanent home. Rising incomes of the visitors to the region and ease of transportation has only fuelled the in-migration to the region.

Amenity migration in the Adirondacks is not likely to decline in the immediate future, regardless of land use regulations or other factors. Likewise, a recent study indicates the continued importance of tourism to the region. The Northern New York Travel and Tourism Research Centre recently completed a comprehensive study of the tourism impact for the northern and eastern sections of the Adirondack region. The study reports that tourism is a US\$1.2 billion industry for the region, attracting as many as 3.4 million overnight person visits (NNYTTRC, 2004). This study did not collect data from the entire Adirondack Park, but the implications on the local economy are apparent. For example, Hamilton County's unemployment, without tourism-related jobs, would reach 69% (NNYTTRC, 2004). But while tourism will continue to generate much of the in-Park employment, it will not, in the foreseeable future, produce jobs of sufficient income to support families and accommodate increasing rents and housing costs. Resident families will continue to generate multiple incomes in order to maintain their quality of life, while available residential property generates new rental incomes for owners or provides a second home to out-of-region owners.

The effect on natural resources such as water and the potential cannibalization of forestland for development, within the Park, is not an immediate threat. Land-use restrictions assure that the vast landscape of the park will, generally, remain pristine. But pressure on hamlets and villages to develop land will inevitably lead to concerns about water and wastewater treatment (already affecting Lake Placid) and the maintenance of a community's sense of place. Although

development within a village boundary can be quite dense, allowing heavy residential and commercial development is counterproductive to the lifestyle sought by the amenity migrants. There are already a few anecdotal evidences of friction between new and established residents over appropriate land use.

Recent and proposed economic growth in Clinton County (north-east corner of the region) and the Albany area puts further pressures on the region as a residential alternative. Travel time is not necessarily significant for those desiring a more rural lifestyle to complement a reasonable wage earned in a manufacturing facility in nearby Plattsburgh. Similarly, new growth projected around the Albany area's nano-technology initiative will result in high-paying jobs within easy commuting distance of the south-eastern parts of the Park.

There are efforts underway to link Plattsburgh and the Canadian border with Albany in a high-technology corridor that would join these two economic areas to attract and develop additional technology and manufacturing jobs based on a linkage between Montreal and downstate New York. As wage rates and employment opportunities increase, so do the opportunities for workers to locate away from the more metropolitan areas and commute to work. Nearby communities of the south-eastern Adirondack Park will provide prime residential opportunities for Albany employees seeking to avoid the urban congestion while being close to their jobs, recreational opportunities and a higher quality of life. Should the technology corridor expand north, it will encroach into the Park boundary, where light commercial development is possible, and where workers will be able to seek a high quality of life within easy commute of work.

Even within the central areas of the Park, second-home building will continue as long as a strong economy and ageing population provide for the necessary wealth to purchase increasingly expensive properties. In 2002, properties in the Old Forge region were being purchased site unseen by 'downstaters' with either the income or the equity to purchase a second (or first) home in this area. This trend continues even as property values rise in that area (CAST, 2002).

In the case of state acquisitions of land that further limit development, the discussion continues

as well. Conservationists make the argument that conversion of private land to state ownership is in the best interests of local communities (The Adirondack Council, 2003a,b). But the jury is out on the long-term implications of such actions. Certainly, much can be said about the benefits of conserving the very resource upon which the region has depended for so many generations. But to exist, communities need more than the forests – they need ways of creating and maintaining employment and the community itself.

Conclusions

Adirondack amenity migration is currently characterized by second homeowners drawn to the region by its quality of life (recreation, natural amenities, low crime rate, etc.). While some of these seasonal residents do ‘convert’ to year-round living in the region, there has not been the growth of permanent residents using the region as a residence while earning their living elsewhere (e.g. telecommuting). The lack of the latter has been a disappointment for economic developers in the region, who view the Park as an opportunity for such inward migration.

Amenity migration will continue to be a topic in discussions of development in the Adirondacks. Communities faced with limited economic development opportunities will view

rising property values as an immediate benefit, as the communities’ tax base grows. But some communities are recognizing the double-edged sword of amenity migration. The growth of second-home properties and the seemingly endless supply of new second-home purchasers ready and willing to pay above-market prices will continue the pressure on year-round residents to find affordable housing. Those expecting to move to the region for employment (seasonal or year-round) will find their incomes further stretched by higher housing costs.

No community in the Adirondacks has taken the step of some communities in the western USA – creating legislation that would shift the burden for affordable housing to developers. Nor do many communities want to stifle reasonable growth. But increasing pressure on land use and conservation of existing resources will, and has, become more of a priority. The Adirondacks could be an opportunity for model initiatives to manage growth. Can Adirondack communities learn from the experiences of the Rockies or Europe to find innovative means to accommodate amenity migration and sustainable development while protecting natural resources and the quality of life? Will those who are migrating to the region now, in the future look at their lifestyle and wonder where the schools went and why the services they expected are either unavailable or being delivered by people who, because of rising property costs, must commute to work from outside the Park?

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13 Cultural and Environmental Amenities in Peri-urban Change: the Case of San Antonio de Escazú, Costa Rica

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Introduction

Mountains cover 60% of Costa Rica, and much of this territory is environmentally protected under the National Protected Area System (NPAS), a designation that includes 25% of the entire country. These two conditions, along with the country's particular historical path, have led over the past decade to a current political-economy based principally on tourism and foreign investment. An increasing number of foreigners are choosing to live in Costa Rica, and many are amenity migrants. This case study examines the role of these and other in-migrants in local change, especially their impact on the use of land, its conservation and development. It focuses on Escazú County, and more particularly its San Antonio District, an area with comparatively intact cultural and environmental assets in the periphery of Costa Rica's expanding capital of 1 million inhabitants, the Metropolitan Area of San José (MASJ).

In Costa Rica increasing immigration, along with the explicit promotion of real estate for foreign residents, is contributing to rapid development in towns close to or in areas with natural and cultural attributes. This is intensifying a land use change that directly threatens natural water sources, scenic landscapes and their rich biodiversity. Also newcomers to these places, both foreign and wealthy Costa Ricans, demand improvements in public services. Escazú County,

at 17%, has one of the highest concentrations of foreign residents in the country, the widest number of resident nationalities and the greatest concentration of foreigners with the highest education and income levels.

Although only 10 km from downtown San José, Escazú, and more particularly its San Antonio District, is one of the remaining locations in the Central Valley of Costa Rica where cultural and environmental amenities are fully evident. Here the topography, irrigation systems for horticulture use, land tenure and relatively poor access have comparatively slowed urbanization's impact on local culture and land use. Families have been able to maintain some of their traditions, and local environmental and cultural agendas have been sustained, supported by grassroots efforts over a 20- and 10-year period, respectively. But Escazú's attractive landscapes and scenic views, comparative closeness to the urban core and improving access to public services, along with land development emphasizing natural amenities and exclusiveness, are factors accelerating the trend of land ownership shifting from farms owned by traditional families to new residential areas.

The natural beauty and cultural traditions are being converted into commodities. Local landowners and their families are torn between preserving their traditions and selling their land for high prices and moving elsewhere. A consequence is the loss of their tradition. Are these living

traditions doomed, as has commonly occurred elsewhere in the country? Will the mountains be tied into the urban grid as exclusive gated communities? What related role are foreign amenity migrants in particular playing? Can these natural and cultural attributes be prevented from threatening their own sustainability? The following pages explore these questions with an example of the tension in areas located next to protected and otherwise natural areas in Costa Rica. The study focuses on the particular motivations of foreigners choosing to live in the still comparatively rural San Antonio District of Escazú County.

The findings here are based on documentary material (population, housing and household census and building construction statistics) and field research. Two focus groups and interviews with local community leaders, farmers and culture workers and other residents provided perspectives on the changes over time to local cultural practices. Fifteen foreign amenity migrants residing in San Antonio were also interviewed. In addition, the author's extended participant observation in the county has been drawn upon, especially where it focused on community organization and change in the natural and built environments. Specific field research for this study took place between March and June 2004.

A Mountain Environment

Costa Rica's mountain ranges are oriented north-west to south-east, dividing the country into almost two equal halves. Three mountain ranges are readily distinguishable: the Central Volcanic Cordillera, just north of Metropolitan San José (3432 m elev.); the Guanacaste Cordillera in the north-west part of the country (2028 m elev.); and the south-eastern Talamanca Cordillera (3812 m elev.) The 34 watersheds of this unique topography are responsible for a great number of springs, streams and rivers.

Altitude, location and geological formations yield a variety of micro-climates from cool to wet, enabling dry, rainy and cloud forest ecosystems and adding up to about 61% of the country's territorial landforms and life zones (SINAC-MINAE, 2003). The country is capable of

producing tropical forest vegetation in more than 90% of its territory and in practically all its mountains. Costa Rica is known for hosting thousands of flowering plants and butterflies, as well as 850 species of birds, 205 mammals and 376 reptiles and amphibians (MIRENEM, 1989). The tourism industry inventories hundreds of natural sites attracting more than half of the nation's visitations. In mountainous natural areas white-water rafting, hiking, camping, bird and biodiversity watching and landscape viewing are typical activities visitors enjoy.

Since the late 1960s, Costa Rican and foreign scientists devoted much of their pioneering studies to learning about and inventorying the country's biodiversity. This formed the basis for the scientific arguments required for creating national parks that were later developed into the NPAS. Also stimulating this biodiversity research was the millions of natural forested hectares that had been systematically depleted in the past 40 years, principally for timber and agro industry. Over the last two decades, however, an environmental agenda has been mainstreaming itself into national policies. This resulted in the country's tourism take-off during the 1990s, and it turning into the premier source of foreign currency for most of the time from the middle of the last decade. Natural areas visitation by both Costa Ricans and foreigners has been increasing four to fivefold, and in 2002 Costa Rica became the Central American country with the most tourist arrivals (1.1 million), and since then the highest per tourist expenditures. Paralleling tourism development, as a consequence of the country's stability, natural assets, tourism promotion, educational and recreational options and land availability, amenity migrants have become significant key players in the country's development equation.

Located in the Central Valley of the country is the Greater Metropolitan Area (Metro Area), made up of its four major cities (San José, Cartago, Heredia and Alajuela) and inhabited by some 2.3 million people or 54% of its population. Stimulated by tourism and other economic growth the Metro Area is extending itself, especially targeting the eastern and western extremities of San José City. Around this metro area is the upland buffer agriculture zone, which has been experiencing pronounced change from

agriculture to urban land use, particularly towards the north, west and the south-east. The coffee, sugar cane, small grazing areas and horticulture communities are changing into new residential areas with the steady arrival of newcomers. With this, infrastructure has also had to be developed, not only for national economic growth and increasing internal domestic migration, but also to accommodate a growing number of foreigners choosing to visit, study, retire or work in Costa Rica. One of the serious impacts of this change is the contamination and reduction of the underground waters, since the water infiltration areas are precisely located in these supposedly protected uplands. Parallel to this, since the early 1990s the municipalities with jurisdictions in the buffer zone, including Escazú County, have been hotly debating zoning regulations.

Natural Amenities and Land Use Change in Escazú

Small in territory (34 km²) and with about 52,000 residents in 2000, Escazú County is administratively divided into three districts. The Central District was founded in the 1700s as one of the earliest colonial towns of San José Province, it officially became a city in 1920 (Macís, 1988) and today is the county's urban centre. In the northern section of the county is the District of San Rafael, historically settled by the political-economic elite. It was traditionally dedicated to ranching and in the 19th century became the location for weekend and summer recreation of San José's elite families. Contrary to its industrial use zoning in the Greater Metropolitan Zoning Plan of 1970, San Rafael is developing into one of the most expensive and exclusive residential districts of the County and the Metro Area. Third, in the south is San Antonio District, which has three distinct landscapes: a rural town with linearly aligned residences on both sides of steep streets running uphill from its centre; agriculture lands, mostly dedicated to horticulture; and the hills and mountains in its southern section, administered under a *Protected Zone* conservation regime since 1976, but mostly privately owned.

The uplands, called the Escazú Hills, are the northern edge of the Talamanca Mountain

Range closest to San José City. They begin at 1400 m elevation and abruptly escalate into rocky peaks forming Pico Blanco (2271 m) and Rabo de Mico (2424 m). Pico Blanco is locally known as an optimal training destination for tropical mountain hikers preparing to ascend Chirripó Peak, the highest in the country at 3812 m, and a recreational amenity for neighbouring communities and visitors. With an annual mean precipitation of between 1700 and 2000 mm, these mountains produce 32 water springs yielding 500 l of water per second for approximately 150,000 persons from neighbouring communities, a meaningful contribution to an increasingly scarce and expensive resource for the city dwellers below.

The above condition set the stage for legislators in early 1976 to include the Escazú Hills in a national Executive Decree giving birth to a group of *Protected Zones*. A baseline biodiversity inventory in 1990 showed that the mean diversity in forest sections of these hills equalled 40 species per ha² (Ayub *et al.*, 1991). Escazú Hills contributes 20% (37 species) of mammal species to the nation's total, and 16% (142 species) of its birds, including 11 endangered ones. A total of 5.5% (585 species) of the country's flora biodiversity was found here. Escazú mountain vegetation is representative of two ecological life zones that are being, over time, systematically depleted regionally and nationwide: very humid pre-montane and very humid montane.

However, in less than a lifetime, 50% of its large wildlife has disappeared (CODECE, 1991). The current status of protection as a *Protected Zone* suffers from a complex array of control and land management circumstances. For example the hills are administratively segmented into a pie of six counties.

From Productive Land to Commodity

Key characteristics of Escazú's urban growth are evident from building construction and occupancy data. While Escazú's total population has doubled since 1973, residential building permits increased 400% in San Rafael District and 190% in the Central District. Limited space in the Central District and denser growth is reflected in housing repair and enlargements being twice as

much as the other two Escazú districts. Also apartment units tripled between 1995 and 2003 in San Rafael and the Central Districts. Contrarily, in San Antonio detached dwelling construction prevailed with twice the number of apartments in the same period. The increase in number of buildings has also been paralleled by the increased size of houses (more rooms per residence) (INEC, 1973, 1984, 2000). During the first quarter of 2003 alone, a total of 882 new residential building permits were issued in the county: 60% for San Rafael District, 28% for Central and 14% for San Antonio. Close to half of all these permits were for residences with six rooms or more, confirming the tendency to construct larger housing for higher-income residents (INEC, 1995–2003).

Escazú County by itself accounted for 28% of all housing in the capital city in 2004, the second largest supplier of residences in the MASJ. Regarding use, *non-occupancy* is an indication of both surplus and, shortage, as well as property speculation. Interestingly, a census sub-category in 1984 identified one of the reasons for non-occupancy as *para veranear*, or *for summer-related use*. The term implies an outdoor recreational

ambience, an indication of the not distant rural past of the urban Escazú, which at the time registered 2.8% (131 units) non-occupied housing. In 2000 this increased to a considerable 10% (1559 units), while San Rafael District was 15% (890 units), the second highest in the Metro Area. Back in 1984 while a field trip to the exclusive outdoor area of San Rafael was not uncommon, San Antonio was much too far, steep and more generally not as accessible to city dwellers. San Antonio's non-occupied residences have been low and with steady but slower increase than the other two districts: from 234 to 372 units, or a 59% increase, between 1984 and 2000 (INEC, 1973, 1984, 2000). By contrast, a recent study of Escazú's demographics emphasized a deficit of housing adding up to 4000 people without homes, mainly due to high cost (Alfaro, 1997). This exclusiveness and lack of affordable housing appear to confirm a segregation trend in the housing and land markets of Escazú County.

Reflecting the above changes, between 1985 and 1996 the number of productive hectares in the County diminished from 1764 to 1091, or 38% (Alfaro, 1997). And in only 9 years, between



Fig. 13.1. Remaining agricultural land use in the urban buffer area of San Antonio, Escazú, Costa Rica, with Escazú Hills Protected Zone above (photograph: P. Chaverri P., August 2002).

1995 and 2003, the county changed 97.4 ha of its productive land into buildings. These facts are congruent with the expansion of the construction sector since 2002 and its continuing growth. New housing options have also appeared in the form of high-rise condominiums, along with banks and commercial buildings. High-rise buildings are generating a number of new problems, such as incompatibility in traditionally single-storey residential areas. And this role is significant in the main problems Escazú's government faces, especially insufficient waste management, lack of parking space, traffic congestion and reduced view sheds.

With Escazú's Central District now densely populated, San Antonio has become the focus of developers and realtors. This is despite the lack of favourable conditions for urbanization due to difficult topography, geological faults, limited availability of water in elevated areas, as well as the existence of the Escazú Hills Protected Zone (Fig.13.1). And there is also unfavourable river and flood discharge conditions with landslide and flooding hazards, which have only recently been taken into consideration by the municipal government for limiting building permits.

However, San Antonio is where new land, presently farms and forests, is being rapidly identified, sold, bulldozed, built on and sold again in an urban form to newcomers. Land development forces jumped over the city's boundary belt, an area banned for urbanization, and, beyond, the conversion of land is seriously taking place at 1200 to 1500 m elevation, where subdivisions are limited under the jurisdiction of the Ministry of Agriculture. However, those wanting to develop this buffer area quickly found gaps in the system, leading the way to subdividing rich biodiverse areas and the origins of water springs.

Profile of Escazú County's In-migrants

As noted earlier, Escazú County is one of the counties with the greatest foreign population. Foreigners living in Costa Rica represent only 8% of the total population (296,461 people), and 15% of San José's residents. However, 17% of them have chosen to live in Escazú County (INEC, 2000). While the Central District of Escazú was

composed almost entirely of native Costa Ricans in 1973, some 96%, only 83% were native in 2000. The most native of all three of the county's districts, San Antonio, in 1973 was 98% Costa Rican and in 2000 it decreased to 89%. San Antonio hosted foreign residents from 41 different countries and Escazú from 38. But the largest percentage and most diverse of all is San Rafael District, with double the number of foreign residents, coming from 81 different countries of the world, with 25% foreign born (INEC, 2000).

What explains the high concentration of foreigners in Escazú County? Motivation and perception of the host location cannot be determined from existing Costa Rican census data, and, likewise, little about amenity migrants. However, it does offer some relevant information. The largest group of foreigners living in Escazú is Nicaraguan, and in San Antonio District they account for 83% of all foreigners. Following far behind Nicaraguans, US citizens are the second largest foreign residents in Escazú County, some 6% of the total. All Europeans together are at about 8%, and the largest other group is from an array of Central and Latin American countries. San Antonio District, the closest area to the mountains, reported 10% of its population, or 1690 persons, as foreign in 2000: 1566 from Central America and the Caribbean, 170 North American, 130 European, 122 South Americans and 17 from other places.

What are these foreign residents doing? According to the 2000 census, 21% of all retired people living in the country were foreign born, and of these some 13% resided in Escazú and 13% in San Antonio. Of those living in San Antonio 34% were from the USA, the largest single country represented (INEC, 2000). Others were economically active. Escazú ranked second among MASJ counties for having the higher level jobs among all economically active foreigners living in Costa Rica, 16.2% or 454 persons. But, not only higher-income foreigners choose to live in Escazú; 9.8% of Costa Rican top managers and board directors had selected Escazú. Ranking down, the next occupational categories for foreign residents in Escazú are professional and intellectuals, 5.7% within this category for the country; and technical professionals, 4.8% of this category. For the other half of the foreign population: working in sales (10%); renting, leasing and real estate (10%);

manufacturing industries (9%); and hotels and restaurants (6%).

US citizens were mostly concentrated in land and leasing activities (20%), followed by manufacturing, sales, hotels and restaurants. Leasing, renting and real estate provided an occupation to 402 migrant residents from 30 different countries: Nicaraguans (54%), followed by natives of the USA, Argentina, Colombia and Germany (INEC, 2000). Forty-nine percent of all Nicaraguans in Escazú worked in private homes in domestic services, and 19% were involved in construction. These immigrants, along with other Latin American ones, find jobs in higher-income households in Escazú (both Costa Ricans and foreigners) able to pay for domestics (INEC, 2000).

From the census data and other information developed in this research, it appears that many among these foreign residents were amenity migrants, and typically were North American and European. Moreover, these amenity migrants were both economically active locally and abroad, and retired. In comparison, many more foreign residents were primarily economic migrants, especially the lower-income Nicaraguans and other Central Americans.

Amenity Migrants and San Antonio's Amenities

The sample of foreign residents interviewed (key informants) was composed of eight males and seven females who resided in San Antonio and were chosen because of their amenity migrant characteristics (Glorioso, 2001; Moss, Chapter 1, this volume). They had moved to Costa Rica between 1962 and 2004 (ten arriving after 1995), and had made between two or three visits to Costa Rica before definitively living in the county. Two out of three were legal 'residents' and the others were 'retired' (a status for residing in Costa Rica with an income from abroad), or in the process of obtaining either status. Forty percent of this group was North American (one Canadian, five from the USA). Two Nicaraguan and one from Dominican Republic represented 20% from the Central American and Caribbean region. One was from Thailand, and 33% were from Europe (Italy, Germany, England, France and Belgium).

The sample shows consistency with the 2000 census profile of foreign residents, in that all were occupying top managerial positions and were from either Europe or the USA. The Central American and Caribbean respondents were in sales, services or undetermined activities. All the mid-level technician and academic positions were held by Europeans. Eighty percent of the economically active worked in the private sector, one worked in an international non-governmental agency and one in a private consulting firm. The Asian, Central American and Caribbean respondents were employed as domestics in private homes. All of those working in hotels and restaurants were European. All the retired informants were North Americans, and the single non-retired North American was occupied in land leasing and real estate.

Reasons for Moving to San Antonio

The majority of amenity migrants interviewed moved to San Antonio seeking a *healthier life*, which they defined as less stressful, living closer to nature, a more comfortable pace of life and rural ambience (Table 13.1). Almost as important were living close to family or relatives and income opportunities (often better incomes than in their place of origin – more quality of life per dollar without having to change lifestyle). Other reasons mentioned by fewer respondents were a wish to change their lives or feel more comfortable than in their own societies. For example, one North American disliked his country's policies and appreciated living in a *country of peace*.

The most important attractions before moving to Escazú were the *natural landscape* and *attractive climate*; 80% of all responses were for these two categories, followed by local culture at 67%. The remaining valued *reasonable land prices*, *friendly neighbourhood*, *security* and *access to utilities*. Comparing these responses to the most important attractions after moving to the area, the respondents kept *natural landscape* as the highest value, followed by *attractive climate* and *local culture*. Appreciation of the *neighbourhood environment* was given a higher value as well as *closeness to urban services*. Interestingly, the *local culture* value decreased and *land prices* were not important after living in the area. All respondents

Table 13.1. San Antonio Foreign Amenity Migrants: Reasons for Choice of Residence.

Reasons	% Respondents
Healthier living	18
Living close to family/friends	16
Job opportunities	14
Better income	12
Desire to transform life	10
Not share own society's lifestyle	10
Reduce living costs	8
Life not so different from place of origin	4
Other	8
Total	100

claimed to enjoy panoramic views at least once a day, 80% walked and jogged, half of them doing so once a week, and 73% did so in the mountains between once a week and once in 2 months. One-third claimed to use and enjoy rivers and streams, and one out of five camped in the mountains. They also enjoyed other amenities such as local foods and horticulture produce, and 75% participated in local festivities.

These foreign residents showed an ability to combine sources of income, with most generated locally but also from abroad. Two-thirds claimed much of their income came from within Costa Rica (46% within Escazú and another 20% from elsewhere in the country), while for 33% it came principally from North America; for 14%, principally from Europe; and for 7%, from Asia. Two-thirds of the respondents claimed to make under US\$2000 and one-third under US\$5000 per month. Most expressed satisfaction with their material comfort compared with their home countries. Expenditure for heating and cooling was unnecessary and food was cheaper. On the negative side, they claimed a lack of discretionary money compared to their situation in their countries of origin, and work was said to be more demanding of time and energy for those working in sales.

Regarding mobility, 14 out of 15 lived permanently in San Antonio. For those travelling out of the country, the average number of days was 30 to 60 during 2003. This was possible mainly due to flexibility of work schedule and

because their income did not depend on their place of residence. In sum, searching for a closer experience of nature, good climate and interesting culture were found to be key reasons for moving. The respondents seemed to have found ways to arrange incomes and to maintain a level of physical mobility, especially for remaining in contact with their homelands.

Local Culture and Natural Amenities

Well known for its abundant local legends, Escazú has a somewhat magical ambience due to a combination of traditional medicinal plant knowledge and superstitious beliefs and practices (*curanderismo*), which gives it a national reputation as a city of witches (Alfaro, 2000). Despite the agriculture territory for traditional export crops systematically decreasing as the Central Valley shifts to urban use, Escazú still has corn and sugar production, while oranges, bananas and *plátano* have practically disappeared. Intensive horticulture is the main activity occupying 400 farmers registered in Escazú (Escazú 2000, 2004).

Within the county, San Antonio District is one of the most concentrated areas of remaining rural life in the expanding Metro Area. It has retained traditions such as the use of rustic sugar cane mills (*trapiches*), ox carts (*carretas*) driven by farmers (*boyeros*), and subsistence horticulture and coffee production. There are local festivities (*turnos*) offering traditional music and dance and food and drink produced by local women. The largest festival in San Antonio is the nationally recognized Day of the Boyero, during which more than 100 *boyeros* and their *carretas* parade in the street.

Other cultural traditions that remain in the district are its adobe houses and the making of large symbolic masked and costumed figures (*payasos*), which youngsters wear and dance to local music (*cimarronas*) at special events or festivals (Fig. 13.2). These most visible cultural manifestations, non-existent or in a slow process of recovery in other counties of the Metro Area, are rooted in more than two centuries of tradition. But, with passing time and urban development the rural appearance and remaining agricultural



Fig. 13.2. San Antonio, Escazú, Costa Rica: costumed dancer accompanied by *cimarrona* music at local festival (photograph: P. Chaverri P., March 2004).

life of San Antonio and some other parts of Escazú seem to be fading. If live animals like horses and cows and people like the *boyeros* did not appear on the local roads, little would remind the dwellers and newcomers of traditional Costa Rican lifestyle.

From a concern over inappropriate use of their natural amenities, neighbours in San Antonio have organized groups to raise awareness and develop programmes to protect the mountains and their remaining sources of water, air quality, panoramic view, recreation and biodiversity. Most well known of the groups is the CODECE Association, a community-based environmental group which has been active for 20 years. Stemming from this environmental organization, a micro-enterprise initiative focused on maintaining culture and related tourism has been active for the past 7 years. Local participating families generate extra income by offering cultural attractions to tourists while keeping their traditions alive. Ox cart and horse rides, mountain hiking and scenery viewing, on-site learning about the molasses-making process with ox-run machinery, and visiting organic agriculture producers are some of the activities their rural tourism programme has been developing.

Perceptions of San Antonio's Amenities

Perceptions of cultural and environmental amenities were studied by having local and foreign key informants choose from sets of descriptors of San Antonio District characteristics. When the foreign residents were asked to rank natural environment, 60% believed San Antonio was in a *natural* state, and 20% *very natural*, jointly adding to 80% of the sample. Only 14% considered the district to have *deteriorated*, and 7% *very deteriorated*. Another question addressed urban–rural ambience and 67% thought San Antonio was *predominantly rural* and 6.7% *very rural*, while 27% considered it *predominantly urban*. They were also asked about the quality of urban services, such as waste management and public transportation, and 73% considered them *acceptable*; 14% stated they were *excellent*.

In the socio-cultural realm, perceptions of social cohesion, value of community life, public safety and cultural attributes were investigated. Close to half the foreign amenity migrants, some 47%, considered the district to be *not at all excluding vis-à-vis* others, and 33.4% as *excluding* and *very excluding*. Regarding social integration, 40%

thought San Antonio was a *little segregated*, 47% considered it *somewhat segregated*, while 14% sensed they lived in a *segregated community* and none in a *very segregated community*. Regarding neighbourhood safety, 6.7% of the foreign residents perceived it to be *very safe*, 40% *acceptably safe* and 53% a *little unsafe*. As to the strength of traditional culture, three out of four thought it was *somewhat preserved*, and 14% considered it *well preserved*. Further, they were asked about the receptiveness of the community to cultural alternatives. Sixty percent believed San Antonio was *somewhat open*, while the rest considered it *somewhat closed* or *very closed*. None thought it was *totally open*.

The foreign amenity migrants, when asked what aspects of San Antonio they disliked the most, mentioned *damage done to nature* and the *lack of local inhabitants' awareness of their responsibilities*, along with *low quality of public services*. Ranked lower was *dislike for insecurity*, *lack of their acceptance by neighbours* and *lack of cultural activities*. Other negatives were *distance from education centres*, *poor water quality*, *lack of laws to regulate food quality*, *trash thrown in the rivers* and *high noise level* (from electronic amplifiers of discos).

Similar questions were asked of local San Antonio leaders, youth and culture promoters. Some 58% of these locals described San Antonio as currently *predominately rural*, half of the locals described its environment as *natural*, and 62.5% described the urban services as *adequate*. When describing the socio-cultural condition, 67% of the locals thought that San Antonio had *somewhat* conserved its traditions. Sixty percent thought that it was currently *somewhat open* to cultural diversity, and 41.7% thought it was a *somewhat excluding* community. The public safety level was *acceptable* for 45.8%.

Their use of both ox carts and adobe houses were the two traditions most important to maintain. The high perception of the adobe house and concern over its loss is due to replacement of some old adobe houses by modern housing and condominiums. Local interviewees also ranked, in a scale from 1 to 5 (1 being most important and 5 being least important), the most important characteristics of San Antonio. Most important was scenic vistas; closeness of family was valued second, while access to public services was ranked third.

Concurrence among foreign and native residents was found in appreciation of the area's natural environment and an acceptable level of urban services. There were divided impressions on local public safety and security and the level of exclusiveness, both items reflecting personal perceptions of the changes the area is exposed to and rapidly needing to adapt to.

Future Expectations

Eighty per cent of the foreign amenity migrants wanted to see San Antonio *rural* and *predominantly rural*, showing an overwhelming appreciation for this type of ambience and its cultural causes. This corresponded with 70% wishing to see indigenous cultural traditions *very preserved*, and 30% *somewhat preserved*. At the same time 62% wanted to see the community *more integrated*, and 8% *very integrated*, and the community's receptivity to the outside as *somewhat open* (45%) and *totally open* (27%), while 27% wanted to see it *somewhat closed* or *totally closed*. Looking to the future, 37.5% of the locals were happy with San Antonio as a *predominately rural* area, 42% preferred it to be *very rural*. A large 71% wanted its cultural traditions to be *well preserved*. However, 62.5% wanted San Antonio to be *completely open* to cultural diversity.

In sum, aggregated responses of both local and foreign residents are consistent in envisioning San Antonio as either rural or more rural than its present condition. Locals would like to see San Antonio somewhat integrated, but the foreigners would like much more integration. Both groups concur with maintaining strong local cultural traditions. Finally, locals would like to see the community very open to cultural diversity, but foreign residents seem to think more conservatively, wanting to keep the community less open.

The above findings were taken as good news by members of the County Zoning Commission, who had lived all their lives in San Antonio and wished to see it sustain and strengthen its traditional roots. But for those who only know the district in recent years as one of rapidly changing land use from productive agriculture to commodity value with residential growth, these findings appeared quite surprising.

Key Amenity Change Factors

What did the foreign amenity migrants in San Antonio believe were the key factors changing cultural and environmental amenities, and what were their relative impacts? Based on the study's earlier analysis, they were given four choices: *promotion of tourism*, *locals selling their land*, *promotion of urban growth* and *greater presence of foreigners living in the area*. As is shown in Fig. 13.3, *promotion of urban growth* was selected as the most important factor, followed by *promotion of tourism* and *locals selling their land*.

Regarding the natural environment, a little less than half of these foreign residents believed that *urban growth promotion* was having the greatest impact, followed by the *selling of land*, and 20% thought the greatest impact came from national *promotion of tourism*. Therefore, the presence and increase of immigrants themselves were not considered a significant factor affecting San Antonio's environment. Other reasons for environmental loss pointed out by the foreign informants were: environmental resources do not have private ownership; trash, plastics and old appliances thrown on to seldom-used mountain roads; waste water into rivers; deforestation; erosion; forest fires; and trash in the streets.

Urban growth was considered the cause of local culture loss, and residency of non-natives was then ranked equal with the other two

options, land marketing and tourism. Those opposed to community openness feared San Antonio could suffer further cultural loss. So far, San Antonio's loss was not perceived as strong when compared to San Rafael, the latter being compared to Miami Beach, USA. These foreign residents were also concerned about youth not being interested in traditional practices, such as working in the *trapiche* or picking coffee since payment was low. Also, the loss of cultural resources was explained as the result of fewer people promoting cultural activities.

Self-perception among the foreign informants reflected an overall positive image. They not only agreed on sustaining the appreciation of culture and the environment, but identified themselves as engaging in supportive social projects, such as animal care, repairing adobe houses or supporting a local women's cooperative recycling centre. At the same time, respondents did recognize the existence of negative impacts on nature amenities by foreign newcomers, such as stimulating the construction trend, taking advantage of limited resources like water or increasing population density. On the other hand, their own negative impacts were minimized. Yet an absolute majority showed willingness to contribute to the support of culture- and nature-sustaining activities, an eagerness that was expressed in practical terms, such as sharing ideas, knowledge and contacts, as well as supporting the local economy.

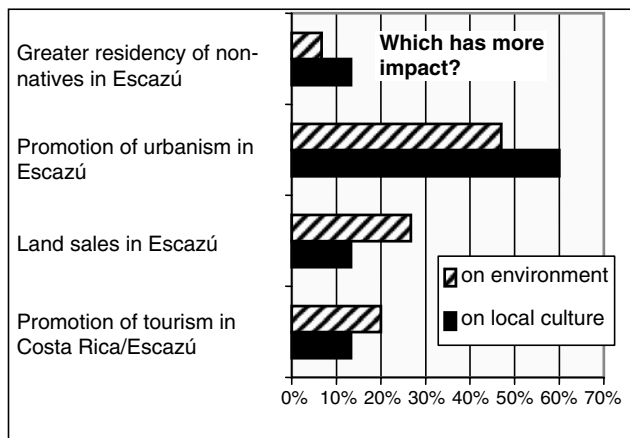


Fig. 13.3. San Antonio foreign amenity migrants: opinion on factors impacting culture and environment.

Perception of Changing Community Space

According to the opinions of long-term local inhabitants, newcomers, including foreign residents, can shift a neighbourhood's character, including its traditional use of space. As described by one local resident, the large size and particular styles of new houses strongly distinguish their modern architecture from the existing surrounding ones. And the characteristic high walls and security guards introduce irreversible changes in the street ambience. In addition, locals who sell their properties and move out represent a loss. Those remaining, when facing changes in land ownership in their neighbourhood, also have to cope with adjusting to the absence of long-standing family ties and community connections. The loss of use of implicitly shared spaces is an aspect seldom pointed out. Unwritten agreements which make possible the wide use of neighbourhood land are suddenly gone. Examples of these shared practices occurring in private and public space in traditional rural and peri-urban neighbourhoods are informal easements on public land for shortcuts and paths between properties, land lending or leasing for grazing and fruit or crop surplus sharing among extended family and neighbours, particularly youngsters during harvest.

One of the disrupting icons of land use change affecting community perception of integrity are the property boundaries changing from wire and live fences into tall concrete walls with *private property* and *no trespassing* signs, abrupt to the eyes of neighbours. People are accustomed to having an uninterrupted full view of their surroundings, an essential part of their social space, along with collective use of paths to fruit and coffee plantation areas, grasslands and paths to the mountains. After selling their land, neighbours expressed revealing loss and depression symptoms, as their property entailed all they have known and work for in their lives. Urbanization, therefore, appears as the force impacting the most on traditional life, including consumption styles, and the use and quality of the natural areas.

Responsibility for Policies and Planning to Sustain Amenities

National and regional development plans in sectors such as transportation, electricity and water services established and executed with mutual coordination and under agreements with local authorities do not occur as often as needed. On the other hand, road improvements can occur in non-relevant and even in inconvenient areas (such as new accesses and roads to and surrounding natural areas), while main streets with high traffic remain unattended, with lower priority. In some cases, national-level authorities, such as ministries, have greater weight in development, limiting in various ways the scope of municipal governments' management of their jurisdictions.

Public officials tend to perceive the current urban development as an uncontrollable driving force, justified with phrases such as 'progress cannot be stopped'. But on the other hand, some innovative land use regulations have been adopted for the two urban districts of Escazú, and for the specific Protected Zone of San Antonio District (La Gaceta, 2005). The buffer area of San Antonio District, currently deemed an Agriculture Zone, is being studied to develop a micro-zoning plan. And specific land use regulations, such as limitations to permitted subdivision size, total construction area for housing, building materials and road improvement have been adopted for the Escazú Hills Protected Zone.

The private professional sector linked with real estate, construction and development exerts demands for services in lands sold in the buffer area. Based on their knowledge on how to move around the public offices for permits, these agents have been actively easing the path for the land use changes. Increased knowledge and better tools in land use controls, land incentives and protective policies for sustainable development would allow public administrators and decision makers to develop assertive planning and related initiatives with independence from special interests.

How prepared and organized are San Antonio's communities to take on the tasks of sustaining their cultural and environmental amenities? More than half of the locals and foreign residents interviewed (53% of foreign and

58% local) regarded San Antonio as *somewhat organized*. But in the opinion of respondents much more has to be done. The role they gave to public authorities was small, while citizens and community groups were given greater roles in proposing regulations and developing effective preservation policies. When given options to respond to the question: *Who are the entities responsible for cultural preservation?*, one-third of local interviewees believed *the citizens* themselves were the major responsible stakeholder for sustaining culture. Regarding what public entities were responsible, 20% stated that the local government was and 17% mentioned the Ministry of Culture. This civil responsibility response poses a challenge with regard to how to involve citizens and to develop policies, whether individual, community-based or national.

Regarding environmental responsibilities, close to half the local key informants believed citizens themselves were responsible for protecting the natural resources. At the same time, 25% saw the local environmental organization (CODECE Association) assuming the greatest responsibility. Contrarily, the role of the Environmental Ministry, local municipality or other institutions was considered small. This may be the result of the low visibility of public authorities and people placing little hope in them, compared to CODECE's presence for two decades.

Conclusions

The present study reveals the complexity of interaction between humans and the attributes they appreciate in high-amenity areas. How to create living conditions in areas with such assets without degrading them is still unresolved. The pace of residential development is currently greater than the efforts to prevent the amenity loss. Preventive efforts seem to be the *de facto* responsibility of individual citizens and non-governmental organization initiatives.

Foreign residents, especially the amenity migrants, living in places like San Antonio District, seem to be equally torn as locals between enjoying and appreciating the amenities and making a living off of them. A portion of native and foreign

people involved in the occupational categories of commerce, hotels and restaurants, leasing and real estate are promoters of tourism and of land, especially residential development. Therefore these stakeholders directly and indirectly participate in the urban change that is occurring. Locals and foreign immigrants, including amenity migrants, who need to make a living in Costa Rica, working in expanding and profitable economic activities such as land development, can also regret the losses urban development is rapidly bringing about. The foreign amenity migrants interviewed placed great value on nature and traditional culture, yet their role in sustaining these attributes was little evidenced in the present study. A few mentioned supporting social programmes.

Foreign newcomers choosing places with high amenities have considerable contributions to make to host-country inhabitants, sharing the likelihood of unwanted scenarios and urging corrective and timely policies. The experience from other countries that amenity migrants share and put into good use for local amenities protective initiatives can promise better choices for themselves and for locals living in areas experiencing rapid changes. Willingness to reach out beyond language barriers, time commitment and organizing styles, and sharing an understanding of institutional idiosyncrasy are aspects to be overcome by both native and foreign neighbours living side by side who share an appreciation of traditional lifestyles and the community's rootedness, along with respect for nature's gifts, from potable water to attractive mountain landscapes, the beautiful plumage of a bird or the solitude of a high forest grove.

The wishes and expectations shown by an illustrative number of San Antonio District residents for the old ways, nature and outdoor activities are values to be kept, assets to be strengthened and guiding principles to be followed. In this, families who are able to keep the traditions of making a living from the cultural practices cannot be insufficiently promoted. Most of the newly created jobs in tourism, real estate and construction are typically low income, compared to self-generated micro-enterprises. In addition, families not only remain on their lands, sustain their traditional town and landscape, and continue to work at what they know, but also

they are able to influence the authorities. City council members and zoning commission representatives benefit by learning how to establish and develop planning tools for proactive policies, from local innovation as well as from experiences brought from communities abroad.

The importance of demonstrating types of development based on preserving values of communities with high appreciation for their natural and cultural assets cannot be sufficiently stressed. Further studies are needed to reveal the texture and connections of the relationships between foreign residents and the amenity migrants *per se*. Also, future analyses should shed light on the existing and potential relations in micro-areas with valued amenities between amenity migrants and local leaders, government and its policy makers.

Acknowledgements

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14 Amenity Migration in the Patagonian Mountain Community of San Martín de los Andes, Neuquén, Argentina

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Introduction

‘Conspicuous consumption’ of land, borrowing Thorstein Veblen’s classical expression, may well describe key elements of land use in the Andean Lake District since its colonization by the Argentine State in the early 20th century. At first this took place at a slow pace, attributable to an inappropriate and inequitable colonization policy, inadequate infrastructure, the vastness of the region, prohibitive building costs, distance from industrial or administrative centres and a restricted real estate market in and around a few large *estancias* (cattle ranches). Touring the region, *per se* an adventure appreciated in early travel literature, and the quality of consumed services or the social connections gained during a summer or ski season were the common yardsticks for measuring social status and success. However, lasting access to this region’s amenities was typically only affordable by a wealthy minority until the 1950s, and then increasingly this became mixed with, and surpassed by, waves of settlers which included political or economic émigrés. These migrations also included the less wealthy, who came because of economic opportunities, and urban middle classes,

who were principally drawn by the environmental and cultural amenities of the region.

In the past two decades, however, a dual process of harsh contrast took place: social impoverishment and a gentrifying ‘rediscovery’ of the Argentine Patagonia. This change was influenced by a variety of factors, including a burgeoning political–economic crisis, deficient public policies, urban violence in the large cities of Argentina and, not surprisingly, a rising international interest in ‘green’ investment in high-quality landscapes. These conditions converged with the popularization of outdoor sports in general, but more specifically mountaineering, skiing, rafting, trekking, cycling, the use of all-terrain vehicles (ATVs) and a rising ecological awareness.

One of the main objectives of this chapter is to identify the characteristics and consequences of amenity migration in a specific location within this region, San Martín de los Andes, and to assess the importance and historical continuities of its development. These historical conditions, beyond contextual characteristics, are also shown to be closely interconnected to larger institutional configurations and concepts about land use, ‘the frontier’, access to resources and

property claims. In analysing the impacts of this migration, key aspects closely related to the process of local development are also described. In addition, information is developed that can help understand the underlying factors: reason for migration, perceptions of the migratory phenomenon, evaluation of migrants' experiences, analysis of causes and consequences and also, possibly, remedial action.

San Martín de los Andes (San Martín) is the main mountain resort of Neuquén Province, Argentina (see Fig. 14.1). The town sits at 640 m, at the head of Lake Lacar and is surrounded by the Andes. Its premier ski resort is on 1980-m-high Mt Chapelco, but the most important scenic attraction is towering Lanin Volcano, 3776 m in height. The city is also the main gateway community to Lanin National Park. According to an updated public-funded marketing survey and campaign, San Martín is an 'ecological mountain village', and one of the favourite places in Argentina of amenity migrants and tourists.

Methodology

This case study is based on a previous research project about environmental management of mountain tourist centres in Argentina (Otero *et al.*, 2001). The methodological approach used to revise this research done in San Martín to address amenity migration was a diachronic approach based on primary and secondary data. Interviews were undertaken with people who were amenity migrants from different periods in recent years to learn about their migration and their perception of the migration process. Key variables analysed were: time of migration, reasons for migration, familial composition, their evaluation of the experience of being an amenity migrant and the relationship between their activities and tourism. Some native or locally born residents of San Martín were also interviewed for their views on amenity migration and these migrants. An additional criterion in selecting interviewees was their belonging to varying economic sectors of society. In total, 25 interviews

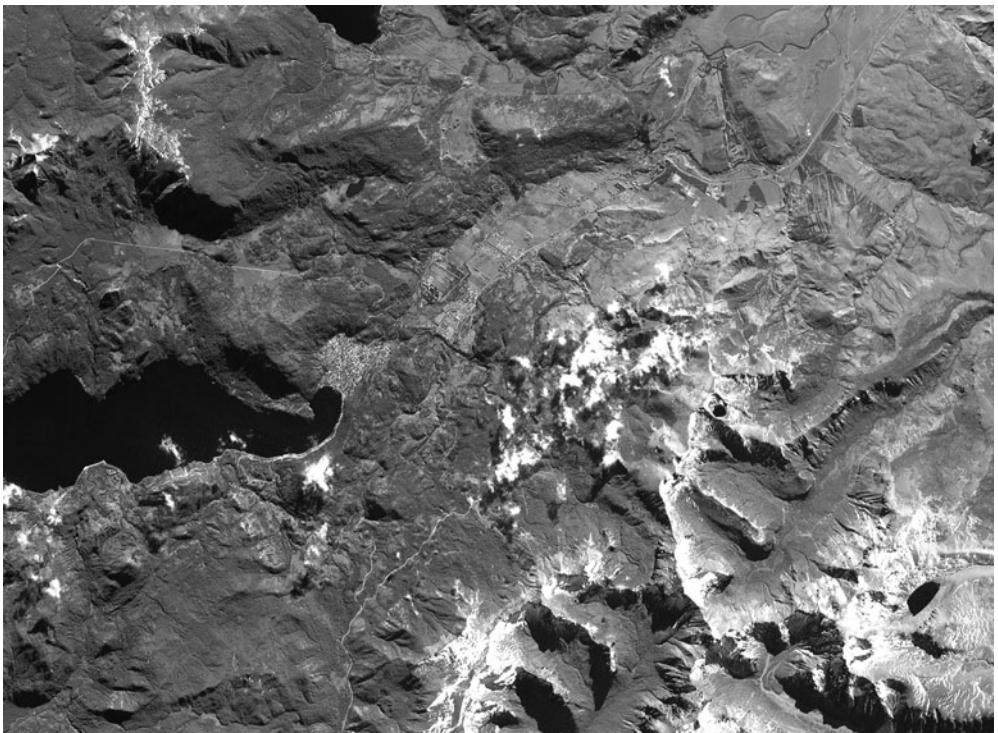


Fig. 14.1. Satellite imagery of San Martín de los Andes and surrounding landscape, Neuquén, Argentina (Landsat image, May 2003: courtesy of M. Abrams, US Jet Propulsion Laboratory).

were concluded. Statistics and other information closely related to our subject were also identified and utilized in our analysis.

‘Argentine Switzerland’— a Long-standing Attraction

This Andean lake region was imagined, idealized and defined as the ‘Argentine Switzerland’ (see Fig. 14.2) many years before its effective incorporation into the nation state at the end of the 19th century. De Moussy, a French geographer, used this rubric in 1865 based on traveller accounts and maps (Navarro, 1999). And it is interesting to note that this happened roughly at the same time the expression ‘ice box’ was being commonly used in the USA to refer to unknown and wild Alaska. This Europeanized ideal preceded the region’s colonization and shaped change and development policies, design of settlements, the dimensions of their streets and real properties and omnipresent real estate interests in both the public and private spheres.

One of the significant and early contributions to understanding this convergence of factors and forces in our study region is a book published in 1970 by a German geographer,

Wolfgang Eriksen, who belonged to a University of Bonn-based tradition of inquiry that strongly relied on empirical information and personal observation (Eriksen, 1970). Although he would now be portrayed as a positivist regional geographer, his data are valuable in framing the phenomenon being analysed here. The subtitle of his work, *A contribution on the cultural-geographic processes on the margins of the ‘oikoumené’ (inhabited world)*, indicates the rather eclectic but informative line of argument to be found in his text. For Eriksen there was a shift in the mentality of key local actors from that of ‘pioneer’ to ‘speculator’. Although the author does not explain the origin, the incidence or ramifications of this speculative characteristic he claims to have discovered, he does provide evidence of how the process of early migration for amenity took place. Although he does not use the term ‘amenity migrant’, he identifies among the first such migrants returning tourists, owners of summer houses who chose to stay permanently, pensioned people (especially middle- and high-ranking state personnel, who retired at age 55 until 1965) and people of European origin whose motivation was to settle in a recognizable or at least reminiscent mountainous landscape (Eriksen, 1970). But this condition, he recognizes, had an earlier, related



Fig. 14.2. Town of San Martín de los Andes, Neuquén, Argentina in wintertime (photograph: G. Tosi, courtesy of Secretaria de Turismo, San Martín de los Andes, July 2004).

expression in the disputes over public land and colonization that followed the retreat of military personnel from San Martín after definite border arrangements were reached with Chile in 1911. This involved mostly Swiss, Italian and Lebanese settlers who wanted to make a living from agriculture, cattle and forestry-related activities.

These first examples of productivity and economic self-reliance in San Martín, however, were soon ruined by governmental centralist regulations and the establishment of trade restrictions with nearby Chile. Instead a dependence on subsidized services and commodities produced in the distant capital city, Buenos Aires, was favoured. This destroying of the local economic base was one of the warnings and reasons for a shift from productivity to speculation that favoured attractive landscape, spectacle and closeness to services and lake shores over soil quality. The general atmosphere changed, according to Eriksen, from bucolic villages to a new sort of 'gold rush cities' (Eriksen, 1970: 132) governed by real estate interests. Most of the documentary evidence confirms his ascertations, including a very long and open letter, a kind of manifesto, to the country's President Irigoyen from the residents of the town of Bariloche (Archive, 1916), asking to correct these measures and to rely more on diversifying the regional economy, including tourism.

However, Buenos Aires, as the rest of Argentina, was going through a process of deep political change. Everyone could vote now and the central government had more important issues to deal with than paying attention to this perhaps romantically attractive but distant, marginal and politically unimportant part of the Republic. It was after the conservative military coup of 1930 that Argentina's national parks became valuable and almost private objects of consumption by the ruling class. The most important rules of the game, and the key conditions that still organize space and place in the whole region, were established during that period. The region had been identified as an exclusive place, especially after the well-publicized visits of US President Theodore Roosevelt in 1913 and Edward, Prince of Wales in 1931, and came under the effective control of the ruling nationalist-conservative elite after the *putsch* that overthrew President Yrigoyen in 1930. Within

the next 10 years railroads were completed, the law creating the National Parks was approved, most of the fashionable hotels and resorts were constructed (and licensed to private companies) and most of the land was parcelled in ways that still affect the structure of prices and limit public use of natural attractions, such as lake shores, rivers, fields and mountains. This development can be characterized as contextualizing the first wave of amenity migration. Most of the subsequent waves, five in total up to the present, are also principally the result of a combination of political, economic and broader social and psychological factors, especially escape from urban violence and insecurity, relocating internal political refugees, search for new values and deeper and qualitatively better family relationships and a growing ecological awareness and appreciation.

Demographic Growth and Urbanization of San Martín de los Andes

The growth and urbanization of San Martín de los Andes may be better understood from the following summary of its relevant historical stages.

Stage 1: the first settlement

San Martín de los Andes was founded in 1888 as a border military establishment along with spontaneous development of large lots next to Lake Lacar. In 1914, the first plotting and subdivision of land was carried out with a layout of 45 blocks of 100 m × 100 m, 20-m-wide streets, land allotments of 50 m × 50 m, along with basic public services infrastructure. The settlement was located next to the military barracks and focused on supplying goods and services necessary for its operation. In this stage the economic base was agriculture, livestock and forestry.

Stage 2: development of Lanín National Park

Lanín National Park was created in 1937, with a total area of 379,000 ha. Its headquarters was

established in adjacent San Martín and so the town's population was expanded with the park's administrative and managerial employees. A significant result of this, and other national areas transformed into parks, was a change in local land use planning and the economic base. While associated forests management gradually, over time, restricted forest activity, agriculture and livestock raising remained stable and important.

Stage 3: major public land management and development change

In 1957, when the national territory was subdivided into provinces, the ownership of public lands was given to the Neuquén provincial government and then in 1960, to the municipality of San Martín de los Andes. The geometric matrix of the urban area (square grid pattern) was expanded, but without being accompanied by a proportional increase in public infrastructure to service this growth. However, the value of land, after the division of the previous large allotments, became more affordable for local residents. In 1964, the creation of the Provincial Council of Planning and Action for Development resulted in considerable changes in the provincial landscape. In our study area, the first achievements were evident from 1966 with the installation of electric power, water and telephone systems. Land use in the first years (commercial, residential, tourism, etc.) located spontaneously before the first urban growth regulations were promulgated in 1974. Incipient tourist activity caused San Martín to become known in the nation's large urban centres, and in parallel, improvement in hotel capacity was financed. As a consequence, by the mid 1980s there was a considerable increase in hotel accommodation and significant population growth took place. Then, beginning in 1983 the existence of diverse land uses, sometimes incompatible, forced the enabling of specific urban land use classification regulations.

Stage 4: commercialization and promotion

In the late 1980s, San Martín's economic growth policy defined tourism 'as a high-priority activ-

ity' for the city, and at the same time, policy was put in place to consolidate the local identity – as a mountain town in harmony with its natural environment. In comparison with tourism, amenity migration has not been identified specifically in public policy, although the flow of these and other migrants into San Martín is having major positive and negative impacts on the town and its surrounding natural environment.

Population Growth Profiles

Absolute growth

The first census of San Martín de los Andes was published in 1912 (Comisión del Centenario y Fundación de San Martín de los Andes, 1999), and it was accompanied by a prediction for swift growth of this town, principally because of its location at the only pass through the mountains that remains open year round, and adjacent to extensive and fertile prairies. Through time, the province of Neuquén and its town of San Martín characteristically maintained high migration rates, in spite of having less than their share of the larger region's socio-economic infrastructure (Toutoundjian and de Holubrica, 1990) (see Fig. 14.3).

Although it is not possible to obtain specific data on amenity migrants from available census data, from our San Martín research we found that they are a major component of the town's in-migrants. However, the more aggregate migration data for the town and surrounding province does offer some insights about our target population.

The town's total population growth has always been higher than the national averages (INDEC, 1964, 1973), and in some periods, natural growth, in spite of being high, does not adequately explain this total. This is due to in-migration, which although variable through time, reached its highest percentage of the total population in the decade 1980–1991 (COPADE, 1977, 1997). However, a quite noticeable decrease in the rates of in-migration can be observed during the next period between censuses, which is explained by the deep, socio-economic crisis experienced in the country in that decade. This began to be reversed from the year 2002, and in fact after 2001 a new migration flow to San Martín is observed (Table 14.1).

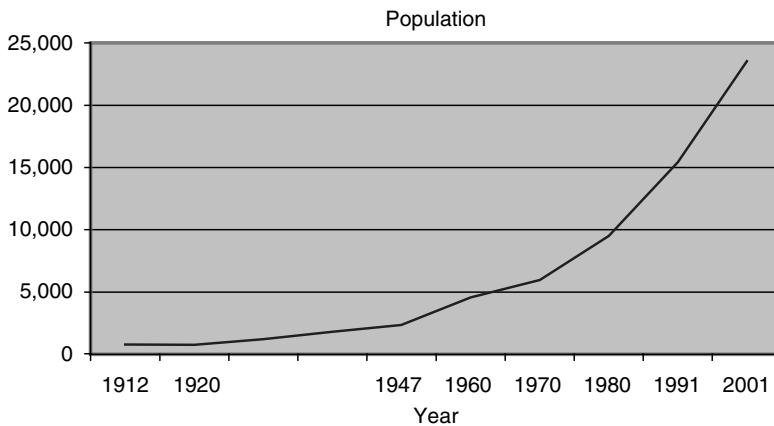


Fig. 14.3. Population growth of San Martín de los Andes, Neuquén Province, Argentina: 1912–2001. Source: Comisión del Centenario y Fundación de San Martín de los Andes (1999).

Population growth by age cohort

According to the study mentioned earlier (Toutoundjian and de Holubrica, 1990), the town's population increase from in-migration between 1975 and 1990 was responding mainly to push factors, particularly the lack of public security and a reduction in manufacturing employment, especially in the surroundings of Buenos Aires city. This is reflected in the population data of San Martín and Neuquén Province. It is most notable for social growth (see Table 14.1), and particularly in the middle and older age cohorts of 30–39, 40–49 and 50–59. If we compare the census data from 1960 to 2001, different age compositions are observed; a reduction of the youngest age cohorts and an amplification of those of older ones are noticeable. This is almost exclusively the result of in-migration.

In addition to issues of public security and employment, from our research the quality of natural and cultural amenities of San Martín and its surroundings were also important attractions for this migration, but such motivational information is not yet available from Argentine census data. In comparison, some is available from the US census and is now being used with informative results in amenity migration research (see, for example, Nelson, Chapter 4, this volume).

The Migratory Phenomenon in San Martín de los Andes

Key explanatory factors

The following section of this essay summarizes the main causes for and characteristics of San Martín's amenity migrants during the past

Table 14.1. Natural and social growth of San Martín de los Andes, Neuquén Province, Argentina: 1960–2001.

Population type	1960–1970	1970–1980	1980–1991	1991–2001
Natural growth	25.9	32.9	24.1	24.2
Social growth	–15.4	2.9	14.2	8.8
Total San Martín growth	10.5	35.8	38.3	15.5
National growth	16.8	18.0	15.8	11.2

Source: Instituto Nacional de Estadísticas y Censos (INDEC, 1964, 1973, 1981, 2001); Consejo Provincial de Administración para el Desarrollo (COPADE, 1977, 1997).

30 years. These findings come from general agreement of the San Martín interviewees and other research components of this study.

- 1937 to 1970s period: creation of Lanín National Park, development of road and rail-road infrastructure in Patagonia, the Argentinean Automobile Club, in agreement with the National Oil Company, promotion of gas stations along Patagonian roads, creation of cartography, guides and camping to promote long-distance domestic tourism.
- 1975 to 1982 period: a time of convergence of the principal push factor of urban terrorism in Argentina's large cities, and the pull factors of local public security and tranquillity, along with the launching of a regional Tourism Development Plan by the Provincial Council of Planning and Action for Development (COPADE) and other public institutions.
- 1983 to 1990 period: recovery of democracy in the nation induced certain people to look for new forms of family life (characterized by increased time together), quietude and a more harmonious relationship with nature, while at the same time many young professionals arrived in San Martín seeking socio-economic integration into the local community.
- 1990 to 2000 period: new residents continued arriving in San Martín with similar characteristics to those of the previous period, but fewer in number.
- 2001 to 2004 period: a new wave of migrants came due to the same local pull factors as in the above two periods, and with two main external or push factors: search for better personal security than characterized the country's large cities and the need for employment. Each of the push factors launches different dominant migrant characteristics; the former has purchasing power above the national average and the latter, in general, low income.

Key external factors

In the last decades of the 20th century, in Argentina the dream of 'living in cities' was translated into a tendency that favoured the small cities with environments where nature prevails, and this is reflected in corresponding migratory flows. Migration is not just a geographical change, but

also a socio-cultural change with psycho-social consequences. Strongly motivating out-migration from Argentina's large cities, such as Buenos Aires, Rosario, Bahía Blanca, Córdoba and Mendoza were the following key factors:

- flight from urban and military terrorism and a pervasive atmosphere of insecurity;
- search for a better quality of life, especially higher environmental quality and social cohesion;
- election of a lifestyle focused on family, which is perceived as more attainable in small towns;
- lack of employment opportunities.

Key internal factors

San Martín de los Andes, located by a beautiful lake at the gateway to a major national park, is surrounded by a comparatively pristine natural patrimony of natural forests and waterscapes with high scenic and recreational value. Here the urban environment has evolved, maintaining from its beginnings a small scale that harmonizes the built environment with the natural environment. In addition, San Martín has maintained a comparatively small-town ambience. The natural and cultural amenities that make the town a premier attractor of both amenity migrants and visitors has been reinforced in the last few decades by the following attributes:

- new paradigms of the quality of life, substantially reliant on natural and cultural amenities within a functional human-scale social environment;
- an orderly and attractive urban place with basic public services;
- white- and blue-collar employment opportunities;
- local investment opportunities;
- the new look of Patagonia symbolized by consumption of Patagonian places associated with adventure, prestige and a wish to discover foreigners' motivations to know it.

Perception of Amenity Migration in San Martín de los Andes: 'NyC' and 'VyQ'

In the interviews carried out with residents of San Martín de los Andes, two interesting self-images could be identified: those who were born and raised in San Martín, the 'NyC' or *native*

residents; and those who had migrated and stayed in the town, the 'VyQ' or *migrant residents*. The key characteristics of the town's amenity migration as perceived by these two groups are outlined below in Table 14.2. This information in particular offers some insight into issues of social cohesion and conflict that the town is experiencing.

Principal social-cultural and economic impacts

Socio-cultural impacts

From the interviews and other sources it appears that the social conditions that produce amenity migration generate a part of the social problems facing San Martín de los Andes. The process of social integration of the new families who arrived in the 1980s with the native inhabitants was very complex and slow, and the resulting relationship weak. Local inhabitants generally, through time, exhibited little permeability *vis-a-vis* social contact with newcomers. And today the town shows greater heterogeneity, as receptivity towards the new immigrants, both amenity migrants and others, seems even less accommodating. Social grouping distinguished by place of origin and income remains in the main preserved, and there exists a heightened sense of differentiation, exemplified in the expression 'we no longer know each other at all'. This condition is also due to the new amenity migrants manifesting little socio-cultural adaptability. For even though they have chosen San Martín de los Andes as their place to live, their behaviour indicates that their attachment to the town is weak and perhaps fleeting, as if they are just passing through. This hinders their sense of identity with the city and, probably, San Martín's social cohesiveness.

The development of this mountain town as a tourist and amenity migration destination is also accompanied by an increase in poverty. And over the last few years, it is thought by some that this has precipitated an increase in crime, notably robbery and drug addiction. However, to date this has not been studied. In addition, the considerable magnitude and rate of population growth from in-migration is exhausting the town's low public services capability, especially for basics such as water, gas and electrical power. For the first time in this centre, during last summer's tourist high season

(January–February, 2004) this led to cases of illegal appropriation of other people's land.

Notorious asymmetries exist in land values because of the high rate of growth in the construction sector of the local economy. Currently, in this urban area floor space costs between US\$300 and 550 per m² in the downtown, and US\$10 per m² 10 km away. One result is that residents who have been living in the city for years are not able to purchase or build their own houses. Because of this high cost, San Martín's housing deficit is already over 1200 units, which translates into about 4800 people, or 19% of the town's population (according to the last census). While concern for this is a condition exceeding financial market terms, the social consequences are still to be defined.

The municipal government considers this matter a state problem. And so a housing emergency declaration that would authorize the municipality to fix the price of housing and building lots is expected. However, it is unlikely that this measure would remedy the situation and it is also probably illegal. At the provincial level, government is preparing to create an Agency for Sustainable Urban Development. This initiative foresees the provincial government, through its provincial bank, developing a mortgage programme for all housing market segments.

On the other hand, in-migration, for both amenity and otherwise, is bringing about an increase in education facilities, new ideas and approaches and significantly more job opportunities of certain types. Yet, the considerable numbers of professionals arriving in the 1990s resulted in severe competition among them for the scarce more-qualified positions. At the same time, young people, especially those belonging to the upper-middle social class, migrate to Argentina's big cities for educational options associated with ambitions they believe cannot be met in their small town and environs.

Economic impacts

The in-migrants, especially amenity migrants to San Martín, invest principally in residential property and tourist enterprises and they mainly become tourist services providers, including hotels and pensions, restaurants, souvenir and clothing boutiques, vehicle rental agencies, tour companies

Table 14.2. Summary of amenity migration perceptions of San Martín de los Andes native and migrant residents.

Amenity migration (AM) characteristics	Native Residents (NyCs) of San Martín (SM)	Migrant Residents (VyQs) of San Martín (SM)
1. Historical identification of the phenomenon	AM phenomenon began with creation of Lanín National Park in 1937 and occurred in four waves	Two AM waves: first at the beginning of the 1980s linked to Chapelco ski resort development; second during the 2000s, with the search for tranquil and attractive dwelling place
2. Internal factors	Improvement of regional road infrastructure and communications with Chile; SM offers AMs appropriate context for their preferred family lifestyle	SM offers professionals development centre's opportunities in 1980s; improved public services; increased land supply; possibility for preferred lifestyle: family style, preferred occupation, with nature
3. External factors	Large cities' insecurity and lack of job opportunities	Recent economic crisis and public insecurity pushed people with purchasing power to SM; search for ambience with natural amenities and good job opportunities for professionals
4. Fiscal incentives	Tax exemptions for increasing lodging capacity	Most AMs did not recognize government incentives to attract them
5. Social integration of AMs into the host society	Difficult and complex in the short term; mentioned problems of population growth: traffic congestion, housing shortage among others	Very weak relationships; NyC not very open while VyQ, especially their children, relate easily; for first-wave migrants integration was slow and difficult, but now are improved; the most recent AMs participate more in social organizations; those with considerable purchasing power live in closed neighbourhoods
6. Economic impact	SM's tourism growth produces new job opportunities every year; seasonal retractions need to be overcome	Positive because AMs come with their own capital and invest in real estate; unbalanced economic growth
7. Social impacts	In the 1990s large numbers of professionals struggled for positions of social value like teaching and government; causes shortage of health and education services; AMs have a 'passing through' mentality and tend to return to their place of origin when positive conditions cease	Previous migration wave people speak of the problems as if they have lived a lifetime in SM
8. Impacts on tourism	Private appropriation for AMs' use restricts availability of recreational amenities	Quality of construction by AMs improved the city image in some districts; investment is considerable, but externally dependent; expressed concern for risk of future instability
9. Proposals to mitigate negative impacts	Most did not answer this question	Policies to guide and limit city development should be applied; national, provincial and municipal governments should regulate resulting activities in both SM and the national park

AM = amenity migration; AMs = amenity migrants.

and the like. Typically, they bring the related capital and skills from Buenos Aires city and surroundings. Only 5% of these newcomers are foreigners. Generally the pace of economic growth of the town's service sector is intense, although this does not guarantee either balanced growth or equitable distribution of income. During the last few decades migrants generally could join the formal labour market; however, these days newcomers not finding employment become part of a growing informal market. In the 2004 summer season some 3000 people sought jobs without success. What percentage of these were amenity migrants is unknown, but it would seem to be a minority because most amenity migrants bring capital to purchase their houses, and often to start in the tourism industry. Also, some leave their family in San Martín and fly to Buenos Aires to work (about a 2 h flight).

Impacts on tourist activity

From the general outsider's point of view tourism is always thought to be capable of improving local employment conditions. However, this is not generally so and is not the case today in San Martín. Moreover, there is no plan to guide economic investment in this mountain community, and in its absence there will likely be an over production of products and services directly or indirectly related to tourist activity in the town and its environs. Here, the amenity migrants enter the picture. As noted earlier, most of the amenity migrants choose to invest in tourist or related enterprises. Within the wide spectrum of tourism enterprises and its linked activities, the prevailing investment is small scale, with an absence of medium and large investments that could diversify the products of this tourist destination. This condition can be seen in tourist accommodation during the 1980s and 1990s:

- prior to 1985: ten hotels were established of one to three star class;
- 1986 to 1993: little development and additional accommodation;
- 1994 to 1997: cabin construction prevailed;
- 1998 to 2000: socio-economic crisis, therefore no investments;
- 2001 to 2004: peak period for cabin construction.

In the development of San Martín de los Andes and its area of influence, connections among the entities and activities that make up the local tourist supply are now consolidating. In this context the trend in tourist accommodation is a move to small villages near glacial lakes and rivers, like Meliquina, Lolog and Quilquihue. At the same time, while San Martín's tourist season remains about the same as in past decades, the decision to expand the Chapelco ski facility into a four seasons resort would be an economic asset for the town. But, in addition, a quite significant, still to be seriously assessed factor in the town's future is the role of amenity migration and its management, especially in relation to tourism.

Conclusions

Amenity migration in the Andean Lake District of Argentina is neither marginal nor simply the result of the 'free will' of settlers. It is the conjunction of multiple factors, which include societal structural conditions as well as ideological and cultural predispositions. Early geographic imagination about mountain places, especially that of the dominant elite in Buenos Aires, and later of European immigrants, is relevant to this condition as it is one of the forces that explains current trends.

Our research confirms that the city of San Martín de los Andes is being significantly affected by amenity-seeking residents, due mainly to its strong attraction as a mountain tourist centre and its amenity attributes *per se*. In-migrants, both those attracted primarily by the local amenities, and others are over extending urban services and housing, creating employment problems and negatively impacting social relationships, including the long-term residents' feeling of being 'invaded' and causing latent conflicts among social sectors. Yet, the amenity migrants also have positive influences, particularly generating some types of income, investment capital and positive social values and behaviour, such as a heightened awareness of nature and the need to sustain it.

Many of the resulting problems and benefits are quite complex and difficult to approach and solve, which makes the intervention of local and

provincial government necessary. However, the deeper nature of this phenomenon and its importance is not yet known. Is amenity migration a societal driving force changing in a fundamental way the socio-cultural, economic and physical nature of San Martín? What are the related needs and risks for public policy and action? How to address the potential for amenity migration to turn San Martín into a 'big city', and with what outcomes for this community, its tourism base, etc.? And are there significant trade-offs to be made between amenity migration and tourism for an ecologically sound San Martín future?

Recommendations

The following are a set of seemingly strategic proposals for addressing San Martín de los Andes' amenity migration issues. However, considerable further attention needs be given to the systemic cross-influences and prioritizing of these proposals, especially in relation to the limited available resources for analysis and follow through.

- 1.** Undertake a study to deepen and broaden knowledge about amenity migration in San Martín and its eco-region. In addition to significantly informing the opportunities and issues discussed in this essay, the analysis needs in particular to focus on understanding the systemic relationship of amenity migrants, other migrants, earlier local inhabitants and tourists.
- 2.** Formulate and implement a plan for urban environmental management for San Martín within an eco-regional framework, using strategic analysis (Moss *et al.*, 1999; Moss, 2004; Glorioso, Chapter 18; Glorioso and Moss, Chapter 5, this volume), and based on achieving for the city an effective balance of economic and social necessities with ecological integrity.
- 3.** Define political parameters and policy that promote, at municipal and provincial levels, the formation of an integrated network of mountain settlements. This system will connect, on one hand, the inter-neighbourhood structure of San Martín, and also link the town with other mountain settlements in the larger Andean Lake District.

- 4.** Formulate a list of causal priorities for sustaining and rehabilitating San Martín's quality of life, with a focus on consideration of the different needs of stakeholders in San Martín as a community.

- 5.** Promote a balance between demographic growth and the productive socio-economic processes to sustain it, especially defining the limits of the physical aspects of the city, necessary tourism facilities and amenities for the local population.

- 6.** Sustain the benefits and the quality of the town's urban services, especially the water, gas and electric power networks, in a way that satisfies demand generated by the population growth of San Martín de los Andes. In formulating this part of the larger environmental management plan, particular attention should be given to urban growth management.

- 7.** It is essential to improve incentives policy and programmes for national internal migration. Important in this is responsible communication that will carefully advise potential in-migrants of all kinds of both the potential and constraints of a locale. In particular, this will need collaboration among the levels of government.

- 8.** San Martín and its eco-region, as with all mountain communities and regions wishing to attract tourists and amenity migrants, needs to better understand the expectations of these people, both before and after arrival at their destinations, and be sure these fit the community's own vision, ecological capacities and plans (Price *et al.*, 1997; Moss and Glorioso, 1999).

Amenity migration is both an opportunity and a threat to sustaining the natural and cultural amenities of San Martín de los Andes and its environs. It, along with more primarily economically motivated in-migration, appears to be evolving into a problem, as well as benefit, to this special mountain place. If we can proceed with a sense of urgency to implementing the recommendations outlined here, its threats may be managed. While there is no template to use for this critical undertaking (see Chipeniuk, Chapter 11, this volume), there are appropriate skills in San Martín, and in Argentina more generally, to successfully harness the best potential of the amenity migrants.

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Part III

Amenity Migrants in Europe

This section of the book gives the reader important insight into amenity migration in continental Western Europe, especially in view of the little information available about the phenomenon in this region of the world.

In Chapter 15, Manfred Perlik has written an incisive overview of the pattern of amenity seeking in the European Alps, where it differs from its common manifestation. Given the continuing attractiveness of peri-alpine, small metropolitan areas and the ease of access into the nearby mountains, typically amenity seekers switch easily between natural amenities in the mountains and cultural ones in the town. The author views non-permanent in-migration sceptically, as it may increase specialization and hierarchization of the urban system and between urban and rural regions through the dominance of second homes. This would likely result in the diminishing of the Alpine cities' urban production system and central place roles and the economic potential of the whole region.

Thor Flognfeldt, in Chapter 16, explores and explains the systemic relationship of amenity migration, second-home ownership and work commuting in the mountains of Norway. He does this in the context of national policy to sustain rural communities and his research on the motivations and lifestyles of people moving back to mountain areas. The considerable contemporary challenge presented globally by new trade agreements and locally by dual residence demands finding new creative solutions to sustain life-ways and the environment, especially from the perspective of local mountain communities. Therefore, Norway needs to give greater attention to the amenity migration phenomenon.

The main purpose of Chapter 17 is to illuminate the complex relation between tourism development, in-migration and local labour markets in rural Sweden. To what extent is tourism development assisted by in-migrants, to what extent is this development caused by them and what is the role of local amenities in attracting the in-migrants? The author, Dieter Müller, accomplishes this analysis through a case study of the important mountain resort of Tarnaby/Hemavan, based on a 1991–2001 comprehensive geo-referencing micro-level database of Statistics Sweden.

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15 The Specifics of Amenity Migration in the European Alps

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Up to now, the phrase ‘amenity migration’ is not in common usage in the European Alpine context. This indicates that in Europe the phenomenon either is very new or has different characteristics. All aspects of this migration given in the literature (see especially Moss, 1994, 2004; Price *et al.*, 1997; Stewart, 2002) should also be relevant for moving to the European Alps (Alps), but as this essay will show, there is one fundamental difference: the close connection to outer-Alpine metropolitan regions is unbroken because of the continuing daily connection or migrations that are not permanent.

Seeking natural amenities has been the basis for Alpine tourism since its early days. While this search has today become differentiated, the landscape beauty, sports facilitation and, more generally, the high environmental quality of the Alps continue to prevail. This is not only the view of tourists and migrants, but also of certain Alpine topics, such as landscape research (e.g. Hunziker, 2000), political documents of the Alpine Convention (1991) and sometimes even from the perspective of local citizens (Keckstein, 1999). The cultural amenities of the rural Alps were seen as a reason to move for the neo-ruralists in the 1970s, and although working alpine pastures by urban people continues, it is now a limited seasonal activity. Today permanent in-migration to the Alps for cultural reasons is rare, as in recent years culture is more than ever considered an urban amenity. Therefore, only those regions that allow having both cultural and natural amenities,

and where switching between the two is easy and swift, are attractive for in-migrants. It will be shown here that amenity-seeking movement into the Alps is strongly influenced by three key factors: close proximity to large metropolitan areas, dense European urban system without the disadvantages of greater agglomerations, and a persisting tourist production system in many regions of the Alpine arc. Consequently, the situation is quite different from that of the Australian regions presented in this volume (Buckley *et al.*, Chapter 19, this volume), and also from the North American regions (Nelson, Chapter 4, this volume; see also Steinicke and Hofmann, 2004), for in large parts of the European Alps, daily commuting and leisure activity is readily possible.

Moss and Nelson (Chapters 1 and 4, this volume) emphasize that socio-cultural amenities have the same importance as landscape amenities. This must be fully agreed with. And as embeddedness in local structures and relationship to local stakeholders are seen as crucial for sustainable regional development, ‘amenity migration’ should be used in a rather restricted way (see also Chipeniuk, Chapter 11, this volume) to refer mainly to permanent migration (see further explanation below). In this narrow sense, a special ‘mountain-focused amenity migration’ scarcely exists in the Alps, as amenity seeking is mostly non-permanent in terms of settlement. This aspect of the European Alps experience also strongly suggests scepticism about the potential for amenity migration in this region. Therefore, differing from Nelson’s contribution in

this volume on the US amenity migration condition, which emphasizes the motivations of the migrants, the focus of this essay lies mainly in answering the questions what may be different about the Alps compared to other mountain areas, why do the differences occur and what may be the interests of hosting regions in promoting or impeding amenity migration? This discourse uses a regional development approach centred on minimizing regional disparities and with the observation that in Europe the attraction of metropolitan regions has not diminished but increased and the move to peripheral places is more a period in the in-migrant's life cycle than a permanent settlement choice.

Demographic, Economic and Spatial Processes in the Alps

Population development

Between 1870 and 2000, the population of the Alps grew from 7.0 to 14.2 million people, but the distribution of this growth varies considerably within the region. The western part of the Eastern Alps (Bavaria, Salzburg, Tyrol, Vorarlberg), and the French Northern Alps (Savoy) has grown strongly. Also the South Tyrol in Italy has witnessed increased growth. However, on the contrary, wide areas of the Italian Alps, of the French Southern Alps and the eastern part of the Eastern Alps lost population. Switzerland had a mixture of growth and decline. The population inside the Alps is becoming concentrated in the broad valleys; it declines in the middle-high altitudes and in the non-tourism-used high altitudes. Population at the Alpine piedmonts increases very strongly, but with the exception of most of the Italian Alps (Bätzing *et al.*, 1996). Although many areas are appropriate for amenity migration, on the southern side especially due to climate, only the ones near metropolitan areas develop this way.

Urbanization, peri-urbanization and metropolitanization

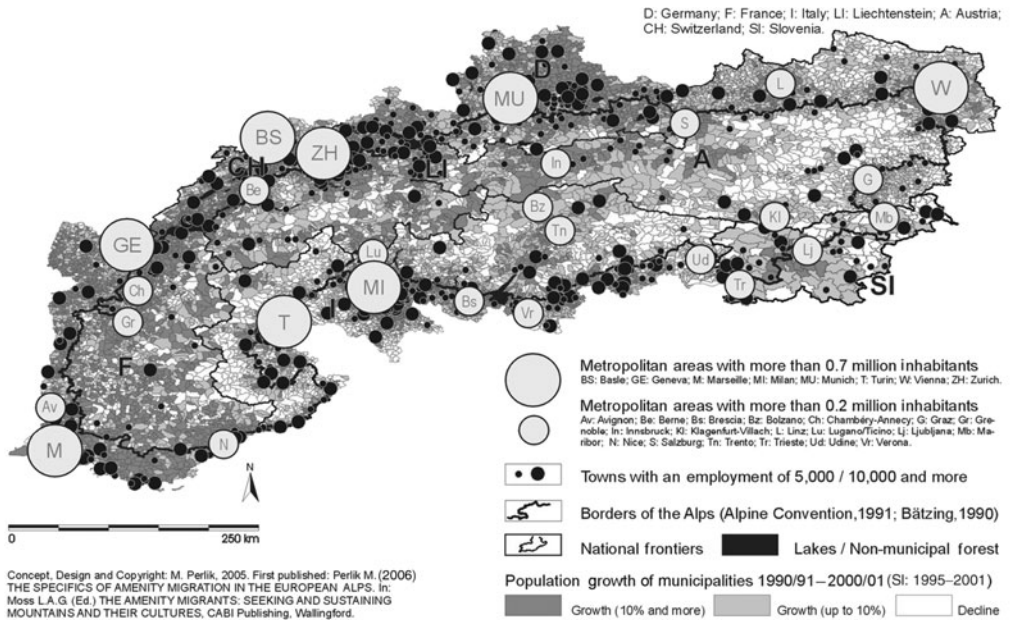
Most towns in the Alps are small or medium-sized centres, only six having more than 90,000

inhabitants. However, the majority of the population (59%) already, in 1990, lived in urban agglomerations. And if temporary seasonal towns in tourist areas had been included, this figure would have been much higher. Already over 17% of the inhabitants of the Alps live in municipalities in their piedmonts, oriented towards the peri-Alpine agglomerations – mainly towards the metropolitan areas of Munich, Milan, Turin, Vienna, Geneva or Zurich (Perlik *et al.*, 2001; Perlik and Messerli, 2004).

The relevant processes in the Alps are similar to the processes elsewhere: first, the growth of municipalities in neighbourhoods contiguous to towns (suburbanization), then, in recent decades, and due to increased mobility, in more distant neighbourhoods (peri-urbanization). And most recently, there is the incorporation of small towns and their environs into the functional sphere of influence of larger agglomerations (metropolitanization). The particularity of urbanization in the Alps is that towns are, even for European conditions, small, which is due to less population density and poor accessibility in the past. Even if accessibility today is relatively good, specific disadvantages remain. Costs per inhabitant for infrastructure are much higher by reason of less people and higher technical effort needed (tunnels, bridges, protection against natural hazards, etc.). Then, the market size for regional goods and services is much smaller, so that employment opportunity is lower. Less people also means less possibilities for social interaction. This is accentuated by the historic division of the Alps at the edges of several national states. As in the past, the Alps have not developed as metropolitan areas or the functional centre of Europe, and they will not do so in the future. Therefore, besides topographic and climatic reasons, there is a specific historical trajectory strongly influencing the Alps' present and future (Fig. 15.1).

The rural regions

Some rural regions declining for decades have recently been turned around due to their nearness to peri-alpine metropolitan regions. Vincent Briquel (1997, 2001) shows this through analysing increasing housing construction in the Drôme region between 1982 and 1990. This reflects one



Source: Censuses, National Offices of Statistics; Cartographic Base: SABE.

Fig. 15.1. The Alpine arc and the peri-Alpine metropolitan areas. Source: SABE (n.d.).

typical form of amenity seeking in the Alps: formerly rural regions that are easily reachable from an urban agglomeration become permanent residences or property for leisure activities during the weekend or seasonally. Depending on distance, these properties may allow daily commuting, are appropriate for ‘freelancers’ and for residence several days a week; and as work time becomes more and more flexible, for everyone. In addition, the north–south shift of population in Europe plays an important role. Living in formerly rural areas near a metropolitan area to enjoy its cultural attributes has also become possible for European middle-class householders after an active life.

A recent study (Schuler *et al.*, 2004) uses municipality-level census data to show that Swiss rural regions had, for the relatively long period of 1970 to 1995, a disproportional growth in population as well as jobs. Since then, metropolitan regions in particular have gained. This change in around 1970 in favour of rural areas, and then in about 1995 against rural areas, is seen as typical retarded adoption of societal changes in the late Fordist and post-

Fordist eras. For the relevant larger Fordist discourse, see Benko and Lipietz (2000). Therefore, the author interprets this pattern as a fundamental change independent of amenity migration that will probably hold, at least for Switzerland. The possible increase of in-comers should therefore rather sharpen the existing disparities between selective areas of growth and more distinct peripheral municipalities.

Economic changes

Municipal census data-based analyses showed that industry is often underestimated (Perlik, 2001) and tourism is, viewed over the whole Alpine arc, not as dominant as generally perceived (Bätzing and Perlik, 1995). But for regions with attractive landscapes and dynamic local stakeholders in the decisive phases of Alpine tourism, this sector today shapes important local production systems together with agriculture, retailing, construction and crafts. The above-mentioned study of Swiss rural areas demonstrates that after relatively prosperous

years, the post-1995 decline not only concerned the high-value-added business service industry but also private services, including tourism. After 1995 such jobs increased especially in metropolitan regions. Furthermore, old industries restructured or ceased, which hit especially the Swiss rural areas as they were decentralized. Lastly, public service and military-related employment were reduced due to economizing public budgets. Another study (Torricelli, 2001) shows that a spatial division between the Swiss midlands and Alpine region occurs as tourism and housing, along with related jobs, concentrate in the mountain area, while high-productive activities concentrate outside. Both Swiss studies prove that the commuting balance turns against mountain regions as out-commuting grows.

Up until now purely residential Alpine towns do not exist, as tourist use is always bigger than residential use. In addition, these towns always have a certain administrative function for their hinterlands. However, the residential function may actually grow stronger in some cases, principally because of an increase in daily commuting (Fig. 15.2).

Accessibility, Mobility and Communication

Among the world's mountains, the European Alps are among the most accessible. In Switzerland, nearly every mountain municipality is reachable by public transportation from a peri-alpine urban agglomeration within 3 to 4 h. Nevertheless, there are differences in accessibility due to historic reasons. The railway system originally was built to transit the Alps in a north-south direction, so today the high accessibility of peri-Alpine metropolises from the Alpine borders and piedmonts allows daily commuting, often by suburban train. And in the opposite direction, daily trips to leisure areas or second homes in the mountains are easily feasible, especially for winter sports or hiking. Accessibility in the longitudinal east-west direction, ensuring connection between the different Alpine regions and towns, was comparatively poorly developed. Topographic barriers remained and the network between regions is impeded, especially due to missing railway connections (Torricelli, 1994).

Although there are many airports in and near the Alps, air connection between its towns is



Fig. 15.2. Sion, Switzerland with vineyards and 3000-m-high mountains in the middle background. Similar to other mid-sized towns in the Alps, it is highly developed culturally and economically for its size (27,171 pop.) (photograph: N. Zuber, January 2005).

poor, as the market is small and so the cost would be high. The division of the Alps into several national states, as well as the mainstream hub-concept of airlines, means one must leave the Alps, reach an outer-Alpine national hub and from there fly back into the Alps. This hinders the possibilities of transalpine network building on the one hand, and on the other has contributed to the small-scale regional units that persist up to now. For amenity-led migration, this condition has favoured short time exchange between Alps and plains rather than inner-Alpine.

Expectations that the new information and communication (IC) technologies would make working attractive also for business service jobs in mountain regions, because of their leisure amenities, grew in the mid-1980s. But this was soon shattered. Although leisure regions still promote 'come to work here, where other people spend their vacations', this hope had to fade because working in amenity regions cannot replace the network necessities of face to face contact in urban areas, a quality which is crucial in tertiary, especially cultural-sensitive economic, sectors. In the 1990s it became clear the new technologies would have a polarizing effect, accelerating ongoing processes and therefore advancing urban places (Floeting and Oertel, 2002). Also, the public and administrative service sector for many years has been restructuring in all countries for economic reasons. A recent study shows that the existing public services are outdated and not as relevant for enterprise as previously, so that their degrading would not be missed (Thierstein and Abegg, 2003). But it should also be clear that regions which are not candidates for the latest technologies and upgraded services are at a great disadvantage, for regions depend on external investment in the newest infrastructure to be attractive. Although above average compared to other mountain regions, accessibility and communication possibilities restrict in-migration for permanent residence to the inner parts of the Alps. Contrarily, peri-Alpine agglomerations can deliver both nearness to the natural environment and metropolitan amenities. When we compare this condition to that of the USA, the Alps seems similar to New England and not the Rocky Mountains (see Nelson, Chapter 4, this volume).

National Differences, Particularities and Examples

Germany

Germany has only a small part of the Alps: some piedmont districts in the perimeter of the Alpine Convention in the hinterlands of metropolitan Munich. Many places within this area, such as Lake Starnberg, have been for a long time the retirement sites of wealthy elderly people. In the last several decades, Munich and its entire surrounding county of Upper Bavaria was one of Germany's high-growth regions due to the concentration of high-value-added manufacturing (automotive and aviation) and business service industries (assurance and banking). It was the winner in Germany's economic shift from north to south. Landscape amenities played a minor role compared to the considerable political standing of the Bavarian regional government, building of infrastructure for the 1972 Olympic Games and the circumstances of a failed evolution in the traditional industrial regions of the country in the north, and after 1990 in the east. Besides the job growth in Munich, the small, peri-urban Alpine towns profited from a growth in permanent residences for daily commuters. They offer good accessibility to the work place (often with suburban trains), urban services and leisure in the Alps. The Munich region continues to change by expansion and integration of former rural areas. Particular characteristics of the German Alps:

- The key factor was not mainly the landscape amenities, but the success of inner-German regional concurrence. Its attraction is a combination of new demographic structure, different social relations of the service and knowledge society, the positive international image of the Munich metropolitan area, the diversity and density of cultural attributes and outdoor leisure possibilities.
- National and international economic decisions favour the peri-Alpine metropolis Munich because of excellent labour markets and the possibility to recruit amenity migrants as new personnel from outside.
- Peri-urbanization spreads from the peri-Alpine metropolitan area, pulled by high leisure amenities and pushed by high rents.

France

For some time, France has exhibited a classical amenity migration from the cloudy north to the sunny south, typically practised by elderly people after an active life. And the preferred destinations were the Mediterranean and the Rhône valley, hardly the Alps. But in the past few decades, the French economy shifted, with deindustrialization and tertiarization, and the winners of this structural change were the regional capitals and their environs in the margins of the country. They are situated by the sea (Lille, Nantes, Nice, Marseille) or in the mountains piedmont (Lyon, Toulouse, Montpellier), are million-population sized and their commuting sheds reach up into the mountains. The Cote d'Azur and Languedoc were in the 1980s and 1990s, the most dynamic French regions with more than 1% annual population growth, and since 2001 Marseille is reachable from Paris within about 3 h via the fast 'TGV' trains. This once again forces mobility and makes it easy to make weekend trips to the south.

Since 1960, the semiconductor industries have been built up in the Nice–Cannes urban area, based on specifics of the French planned economy in cooperation with private enterprises. Governmental regional policy targeted since its beginning the networking of the coastal area without including the Alpine hinterlands (Dumont, 2000). But towns inside the Alps have also gained significance. For example, the growth and fine 'image' of the Grenoble agglomeration, situated entirely in a mountain area, came from several big universities of more than 50,000 students and a high-tech-based industry (semiconductors and nuclear physics) located by national state initiative. These qualities, together with socio-cultural and natural ones, were mutually reinforcing and contributed to the economic growth of the Rhône–Alpes region as the second strongest in France after Ile-de-France (Paris). The example of Gap, increasing from 33,000 to 36,000 inhabitants from 1990 to 1999, shows that regions with poor accessibility and fewer jobs can also gain population. Such towns keep their critical mass by their functioning as district capitals. Besides the towns, however, there are some villages in the French Southern Alps where people from urban regions, sometimes from other European countries, became permanent residents.

Different in the sector but similar in the underlying philosophy, ski-resort development in the French Northern Alps was a kind of industrial planning in the mountains, exclusively for sports using 'snow' as the resource. From 1964 the National 'Plan Neige' was a combination of urbanism with the idea of democratizing winter sports, along with investment potential for French national enterprises (Lichtenberger, 1988). Actually, these 'Stations Hiver' are now being redesigned for a more romantic or rustic ambience, hoping to attract year-round clients. Particularities of France are:

- Upgrading of rural mountain areas by means of public/private societies and explicit national industrial and regional policies.
- Sun- and sea-related retirement migration supplemented by professional migration, mainly to regional metropolitan areas with amenity attributes.
- Peri-urbanization resulting from the social decline of densely settled suburbs and depopulation of rural areas.

Italy

The metropolitan areas of Milan and Turin, but also smaller agglomerations such as Verona (Turri, 1999), reach widely up into the Alps and contribute considerably to the segmentation of the Alpine arc into the influence zones of different peri-Alpine areas. Turin's industrial development drained the work force from the surrounding mountain valleys so that their further evolution was nearly stopped. Many Alpine valleys are out-migration regions, but their people commonly do not sell or rent their properties but use them regularly for vacation. The wish to gain in-migrants to these places is not preferred by the local population, but rather top-down policy to preserve existing settlement structures and built heritage (Alp City, 2004). Investments in tourist resorts are driven by real estate capital and could work in favour of promoting seasonal residents. But contrary to France, these projects have often failed (Bätzing, 1990). By comparison, in South Tyrol, domination by small-scale tourism makes transformation to amenity migrants neither necessary nor desired. And the municipalities on the Mediterranean Sea, as in France, hardly influence

their Alpine hinterland, and often do not feel affiliated with it. The special characteristics of Italy are:

- In some out-migrating regions of the western Alps, amenity migration is only practised by re-migrants after an active life, and in other places second-home owners occupy almost abandoned villages.
- Tourism does not serve as a catalyst for new residents.
- Daily commuting, as well as bi- or multi-local residences in town and countryside have caused enormous urban sprawl in the piedmonts and certain Alpine valleys.

Liechtenstein

Liechtenstein has a high density of 34,000 inhabitants per 160 km². Vaduz, Schaan and Balzers have established specialized manufacturing sites and headquarters of international corporations. They do not promote tourism, in-migration is restricted and amenity migration does not play a role.

Austria

Austria has a long tradition of seasonal amenity seeking dating from the early 19th century, in which resorts, such as the spas Hofgastein and Ischl, developed as residences of the emperors and old high society. After The Second World War, Austrian tourism was a leader in developing early mass summer and winter mountain tourism, and in the 1980s shifted to a young dynamic sportive profile. Recently a new step is being taken in turning to the promising international wellness or health tourism. Here again the focus is on evolving the tourist production system rather than moving to other strategies. Developing pure residential villages would be opposed by the owners of pensions, hotels and agro-tourism, as it may cause them to lose economic and political influence in local development.

For a long time small and medium-sized Austrian towns were mainly seen as central places (Bobek and Fesl, 1978). Their role as urban productive systems was more or less neglected, while villages, which had grown with tourism, saw themselves in this role. Therefore, economic specialization in non-metropolitan areas is concerned mainly

with tourism. In the last decade, the regional capital agglomerations had strong population growth, and peri-urbanization became comparable with other Alpine countries. For example, the Austrian census shows that in the hinterland of Vienna most municipalities have more than 25% second-home residents (Seger, 2003: 132). And one can see again the segmentation and re-regionalization of Alpine space following metropolitan sprawl. The particular characteristics of Austria are:

- Strong position and small-scale structure of tourism and agriculture works as a brake on the development of amenity migration, due to the interest in maintaining and evolving existing economic production systems, especially tourism.
- Small urban centres have mainly central places function, while economic specialization concerns mainly tourist communities.
- For a long time many mountain regions grew steadily and municipalities were interested in gaining employment rather than in-migrants; but since 1990 the peri-urbanization around the regional capitals is running parallel with depopulation in more peripheral mountain regions.

Switzerland

Swiss tourism has existed since the end of 19th century mainly as hotel tourism and in a decentralized form. Noted tourist villages, such as St Moritz, Gstaad and Montreux, served and still serve as a nucleus to rich foreign guests with the financial means to buy houses that stay empty for long periods during the year. This country's federalist structure and the high degree of local communal autonomy brought different strategies for responding to international demands for living in its mountains. There were incentives as well as restrictions for second homes, especially for foreign purchase of properties. Fiscal autonomy of municipalities on the one hand, and the low taxation of citizens on the other gave rise to municipalities' strong interest in attracting rich in-migrants. Therefore, there has been a trend to produce high-quality residential areas, relatively segregated, to attract 'good' tax-paying in-migrants. Today 11.8% of Swiss housing stock is used as second homes, and in tourist regions, especially in Grisons, they account for more than one-third, and in some municipalities more than a half, of the housing stock.

Urban sprawl happens, although prevailing opinion is that second homes raise less regional value added while provoking high demand on local resources, such as land suitable for development and consumable landscape, or communal infrastructure, such as water supply and sewerage. At the least, sensitivity has become so strong that changing zoning for construction has become harder; spatial planning organisations and NGOs will take legal action.

Davos, situated at 1560 m, is a town without an agglomeration belt, which developed over several decades from an old Valsler settlement to a town of more than 13,000. Over time it changed its economic specialization from a climatic health resort with large sanatoriums for tuberculosis and a noted sport resort to recently becoming the location of research institutions and the annual World Economic Forum. But employment is being lost with the closing of the last big sanatoriums. At the same time, there is a plan for a locally financed residential tower over 100 m high, which may shift the town in the direction of a specialized residential function. However, the local stakeholders wish to develop the town with a focus on research and not on second homes.

As in other countries, peri-urbanization of the alpine hinterland of metropolitan areas is important, especially for Zurich, Geneva, Berne and Lugano (Fig. 15.3). Swiss-specific reasons are lower taxes of peri-urban municipalities than in the urban centres. Highly qualified people work in the core town, gain higher wages, use its cultural attractions and have good leisure attributes near home. The core cities have to maintain a high standard of central infrastructure, but to do so they have to increase, not lower, taxes. Not least, this is supported by the good accessibility of public transportation (which works in this context, paradoxical to its ecological aims). In this way, it is plausible that the agglomeration Brig-Visp in the Upper Valais will be integrated into the Berne agglomeration when the 34.5 km Lötschberg-base tunnel under the main ridge of the Alps is finished. Swiss particularities appear to be:

- Early involvement in amenity migration by international rich people, who make use of luxury goods such as 'residence in Switzerland', tax avoidance or prestigious affiliation with international high society.

- Economically liberal attitude with disproportional high communal autonomy able to push municipalities' specialization to residence function. On the other hand, misgivings about the dominance of outsiders may act as a brake.
- Strategies of migrating from town to the peri-urban area for tax reasons. This metropolization may also encompass distant valleys by long tunnels and excellent public transportation.

Slovenia

Slovenia's territory includes the Alps, the Pannonian plain and the Mediterranean coast. Both its largest towns, Ljubljana and Maribor, lie near the Alpine border and today are sprawling into the Alps. Slovenia until The First World War was a member of the Austrian Empire, and after The Second World War became one of the five republics of Yugoslavia. In this latter period, its historic ore mining in the Alps was transformed into heavy industry in the interest of Yugoslavian autonomy. Therefore, little tourism developed, with only a few Habsburg relics of lake and thermal spas being kept, such as Bled. These mainly fulfilled the need for summer residences for national elite. Newly independent Slovenia, however, counts strongly on tourism and has realized several tactics to date, including duty-free shopping and casino-tourism at its borders, home-stay in farmers' houses and several new spas. The interest of Slovene people in second homes, from the Adriatic coast to the Alps, developed after the collapse of Yugoslavia and independence in 1991 (Gosar, undated). And European integration in the medium term should increase foreign demand for the same.

- New positioning of tourism in the economy after the breakdown of the Yugoslavian Republic, especially in tourist services.
- Integration into the European Union, which should increase mobility and international migration in both directions.
- Possible increase of amenity factors by the growing wealthy societal strata in Slovenia.

Monaco

Monaco, on the Cote d'Azur, joined the Alpine Convention in 1999. Its most important 'amenity'

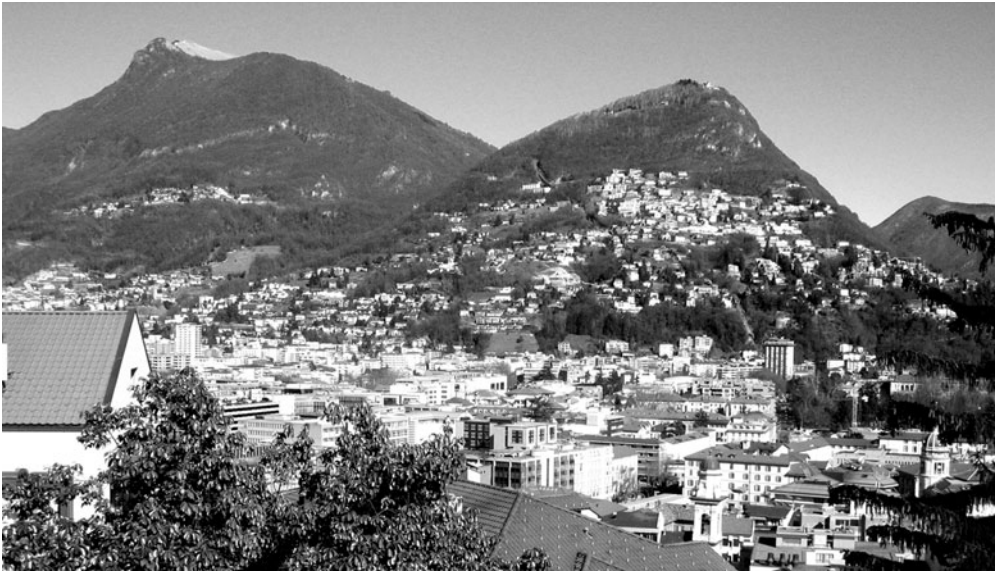


Fig. 15.3. Lugano, Switzerland (52,000 pop.), with Monte Brè in the background, is an Alps premier amenity migration centre (photograph: M. Perlik, March 2005).

for in-migration, dominating all others, is its excellent fiscal condition for very wealthy people.

Impacts and Conflicts

Shortage of land for settlement

The consumption of space for residential land development and related transportation has grown considerably in recent years in the Alpine countries. In Switzerland these settlement areas increased between 1985 and 1997 by 13.3%, while the population grew by 9.4%. Urban sprawl has become a broadly discussed topic, but has not yet led to real change (Schultz and Dosch, 2005). In recent years too, especially after the new market stock collapse, investment shifted to real estate. As the financial sector has become very risk sensitive, this problem has been sharpened, and so now investments take place only in the highest-ranked locations. Construction in the most attractive areas, such as the Upper Engadine, increased rapidly, filling up the formerly allocated development zones, but also massively and negatively affecting landscape attractiveness.

Economic displacement

Land shortage also brings about economic displacement. In resort towns and tourist regions, even present inhabitants, or job-migrants, do not find enough reasonably priced accommodation (e.g. employees in Davos' research institutions). Local stakeholders are, besides tourism, still engaged in agriculture, and a strong amenity migration influx would increase the pressure of concurrence of uses, and perhaps cause destabilization of the existing production system. As mentioned before, the agricultural sector is better protected by planning instruments, so that construction in agricultural zones is normally forbidden. But when agriculture ceases, leisure use may occur without housing, such as golf courses or parks. Generally, the influence of the old stakeholders diminishes with demographic change by in-migrants, directly and indirectly. This accounts especially for the devaluation of agriculture. Furthermore, when the Alps are viewed as a big leisure region, those municipalities that have a traditional industry and whose site conditions became degraded by global economic development get bad report cards (see Chipeniuk,

Chapter 11, this volume). When industry moves away, possibilities for new business in a leisure area are rare and typically there is no compensation to assist new use. Characteristically such municipalities often lie in middle–high topography and lack exactly the amenity qualities desired: sun, attractive landscapes and a positive ‘image’.

Socio-cultural diversity

The further development of a region means abandonment of certain existing structures: socio-cultural behaviour, built environment, impacts on natural resources. Regions have several possible future paths: with or without tourism and maybe with amenity-seeking residents. The difficulty is to maintain and to change appropriately, and for the new to have durable benefits. In a situation where sparsely populated regions have only limited potential for innovation because they are limited in their critical mass (having less social interactions), there is strong risk due to new cultural inputs from outside needing to be adopted with too limited discussion. While on the other hand their own cultural attributes have little chance of being exported as the prevailing values outside are urban ones. The result is a continuing spread of mainstream culture into the periphery with autochthon culture being degraded into folkloristic business. At this time, the principal attractiveness of Alpine towns and villages lies in the mixture of different population strata and economic activities. Tourism profits from agriculture, retail shops profit from tourism and residents, and vice versa. Amenity migration can increase this diversity, but if it becomes too dominant, the mixture may be damaged.

Resource consumption and material flows

Networks such as multi-local housing developments generally raise the intensity of resource consumption such as energy, space and time. In some cases, as with the European integration policy, this may be politically accepted by a majority, although prices for energy, mobility and highway use do not yet reflect the real value of resource costs, but are in accord with integra-

tion policies. Furthermore, exclusive use of an area in a mono-functional way typically increases the total consumption of land use. Both aspects play an important role in the Alps, as the Alpine inhabitants are very sensitive about transportation-caused pollution and space consumption. In spite of this, commuting distances have increased in all countries, causing increased energy consumption, accidents and investment in infrastructure. Examples of this can be found not only in the Alps but in any piedmont near a metropolis, e.g. in the French Central Massive where the Lyon–St Etienne metropolitan area is sprawling by transforming from densely settled suburban apartment-flats to peri-urban single-house areas.

Segregation and territorial decoupling

In recent years, national regional policies have tended to change their demand for mountain regions to be more self-supporting and innovative (ExpertenKommission 2003). This is due mainly to arguments of economic efficiency but uses common sense arguments that the mountain areas cannot develop the same functions as outer-Alpine metropolises and also arguments of ecologic efficiency. The result is a proposed general division of land use: on the one hand metropolitan production systems with efficient manufacturing and business service industries and on the other, less-productive residential, leisure or wilderness areas. These specializations, however, especially wilderness areas, were not common in Alpine history and are today mostly unacceptable to mountain populations. For them it means that the outer-Alpine population wants to prescribe for the Alpine regions a quality of difference and diversity without wanting to pay for it.

Such a development can be interpreted as an increase in loosening regional ties (territorial decoupling). In our context, this means that migrants leave their regions and so are lost to them as responsible and innovative stakeholders. And in their new location they do not become integrated in the same way, as they do not have local tacit knowledge or are not welcome, or both. From a more general point of view it can be concluded that, by this territorial decoupling, ecological aims are mistreated,

as responsibility for land consumption and transport impacts may decline. In considering this, the motivation 'ecological sensitivity' often claimed for relocation indicates a very narrow understanding of ecology, as the reason is actually a lifestyle attitude. Keil and Graham (1998) illustrated such a contradiction in the effort to preserve Toronto's greenbelt while wider peri-urbanization continued to be supported by the construction of freeways. The green-belt preservation succeeded but urban sprawl increased. Therefore, in a wider view, ecological increase or degradation depend more on local anchoring, responsibility and social relationship than only on biophysical indicators.

Stabilizing weak regions

There are also some positive impacts of amenity. In-migrants to rural areas played an important regenerative role in the 1970s (the neo-ruralist movement), although they were not welcome at the beginning. If being integrated, and not part of a segregated strata, in-migrants can bring the necessary knowledge to maintain living in the Alps on a higher knowledge basis, which today, more than ever, needs outside experience, they also bring purchasing power, so stores, services and local crafts can work together and offer higher quality; so that the region profits in a double way: increasing workforce needs and adding higher value by selling more expensive quality services. Even if the new in-migrants are not rich they may increase the demand for goods and services which were previously not common in the region. This again elevates the level of local knowledge and may initiate innovative processes. Lastly, urban demands for natural amenities protection can be more easily communicated when there are exchange possibilities between in-migrants and local population. And greater exchange possibilities may work to strengthen regional cohesion. There are examples of this also being understood by local inhabitants. In Switzerland in the 1990s, some mountain municipalities officially invited families from the plains to immigrate in order to guarantee the future of schools threatened with closure. The call was successful at the time, but not all of these families who came remained.

Reduced buffering capacity against mistakes

The history of rural areas in the Alps is also the history of unrealized hopes. In the 1980s it was said that the new IC technologies could reduce the disadvantages of urban hierarchies. The opposite occurred. If the expectations of amenity migrants should fail because of changed destination fashions and alternative investment systems, new blights of old residential areas may occur. This is an argument against fully specialized residential areas. One may argue that in Europe industrial blights could have been recycled and new tertiary, especially cultural, functions have since been spread on former manufacturing sites. But it is not the morphologic structure, and also less the obvious amenity qualities, which will decide whether a place can keep its innovative potential, but rather mutually reinforcing relations among locally anchored stakeholders. Therefore, a critical mass of territorial-based people guaranteeing local good governance and innovativeness seems to be necessary. The industrial conversion in recent decades was successful in large towns, which were the winners in a tertiarization process. But small and medium-sized towns were often the losers. They lost their industrial base and received nothing new. As towns and municipalities in the Alps are rather small, a change of amenity fashions may cause similar effects and blight the remains of the real estate business.

Commonalities and Differences Between the European Alps and Other Mountain Regions

Commonalities

Changed consumption patterns

Consumer demands have changed in economically developed countries, with preferences shifting from basic goods to cultural goods and natural, aesthetic resources. Fordist-typic consumption patterns, dominant until the 1970s, following the principle 'much of the same' have shifted to the post-Fordist 'maybe less, but the whole range'. This means the upgrading of existing local specialities as well as the invention of new niche-products, e.g. organic food or regionally defined

products. The differentiated consumption pattern reflects the regionalization as a process running parallel to economic globalization. New differentiated products also include the demand for a high biodiversity, which just has been diminished by the older, but still persistent paradigm. Sun, climate and ecological amenities are becoming new luxury goods, but typically without discarding the old ones. Their appreciation increases with better education and becomes obtainable by broader societal strata as long as there is growing wealth. Increasing demand makes these attributes targets of strategic, market-driven planning.

Growing personal mobility and change of place

The number of people who can decide their place of residence is growing, caused by rising physical mobility (transportation systems), rising social mobility (loosened familial and regional ties), financial independence and improved health in old age. Willingness to combine changes in life with change of place has also increased.

Bringing about fragility as well as stability

The consequences of amenity migration as described for other mountain areas should be valid also for the Alps. This depends on the basic principle that the search for rare goods, particularly 'being proximate to nature', quietness or cultural authenticity destroys these qualities if the demand becomes too strong. It accounts especially for the disproportion between inhabitants and the necessity of transportation or other communal infrastructure. The impacts mentioned here (see Impacts and Conflicts) should mostly also be valid for the Alps and other mountains.

Differences

Shorter distances

The first tourists in Europe, the English, traveling in the 19th century to the Cote d'Azur, stayed several months over a whole winter season. Since then, not only the roads and railways to the Alps but also the inner access have been improved. Due to this, the seasonal aspect has

been reduced and vacancies have become shorter but more frequent. Second homes may serve exclusively one's own use, may be used together with relatives and friends or it may be rented occasionally to others. Even daily commuting is possible. As there are many towns in the piedmont of the Alps, also a single dwelling place there can have both urban and rural or natural qualities. Therefore, based on reporting to date, amenity migration in the Alps generally has a different significance than in more remote mountains of Europe or other continents. Living partly in the Alps is also possible in the active phase of life, but in practice it is limited to persons in lax or flexible time-space professions with flexible contact with their clients (writers, painters, etc.).

Less agglomeration problems

Metropolitan areas in Europe are relatively small in global comparison and yet without the marked disadvantages of hypertrophic conurbations. After years of urban crisis due to reinforced peri-urbanization, in recent years a renaissance of metropolises can be seen, which has stabilized their position as centres of the service and knowledge society. Obviously this metropolization process causes, at the moment, more advantages than disadvantages, influencing in this way the choice of the stakeholders.

Less-specialized urban economies in small towns

Small towns in Europe have a relatively important central-places function, delivering administration and public services to the hinterland and being seen as strategic institutions in national regional planning policy. This is underpinned by the political support of European planning ministries, to maintain a polycentric system of towns (European Commission, 1999). Up to now, towns have not yet specialized exclusively in residential functions. Some places specialize in tourism, but these municipalities are mostly upcoming villages and not towns. Also there are relatively few Alpine resort towns. Until now, the population is rather sceptical of such development, and regional planning views specialized residential towns as not desirable. Main arguments against their promotion are the loss of identity in villages

without long-standing networks of local stakeholders, and compared to more multifunctional places, the likelihood of a restricted social and cultural life.

Different aims of regional planning

Land for the location of new residences in the Alps is scarce. Besides topographic reasons this is very much a result of regional planning. Values like regional cohesion have a strong place in the European spatial planning tradition, and so extremely polarizing development between poor and rich regions by uncontrolled economic dynamics is to be prevented. Therefore, land use is regulated by development plans. Especially clear is a distinction between areas where settlement is allowed and where it is not. Early on, this was established as protection against displacements by economic dynamics, especially to give local stakeholders security against this occurring from higher-value-added businesses. Now it has also become an instrument to protect ecological values against urban sprawl. And in the mountains, it also has the function of protecting against natural hazards. The possibilities for specialization of villages and small towns in the direction of resort towns, or other amenity migration developments, therefore are restricted by two factors: shortage of appropriate space and usage norms and values.

Different constellations of local stakeholders

In regions with local stakeholder-dominated tourism (Germany, Austria, Switzerland), growth in amenity migrants is viewed as the expression of declining tourism, which would mean the loss of influence and decision-making power of these stakeholders. As long as tourism is seen as higher value added, local stakeholders will probably prefer staying with it, trying to evolve it and not changing to serve in-migrants. For, due to the shortage of space, residential property generally delivers a lower value added compared to tourism. In addition, economic promotional services tend to reject such a strategy.

It may be otherwise in countries where the tourist sector is not as small scaled and is driven more by the real estate business, such as in France and Italy. But up to now the concept of sport resort prevails there, which is unfavourable to amenity migration as defined here. Perhaps this

will change with concentration processes in the tourist sector, which could provoke a transfer of capital to other activities. In regions that did not develop tourism in recent years, either there is no demand or the local stakeholders are not interested, or they do not have the know-how or other means to handle these strategic questions.

Actually, the main problems lie not in a lack of population growth, but rather in out-migration of the best-qualified people. They go to the urban agglomerations for academic education and do not return, as life in agglomerations is more attractive for them (Egger *et al.*, 2003). The efforts of institutions and organisations involved in regional policy are placed more into getting these people back than obtaining new in-migrants from elsewhere. Promotion of specific higher-value-added activities is seen mainly in gaining non-tourist employment, especially business services, not the private ones. So, amenity migrants creating employment in these sectors would be quite welcome.

Moving into the Alps – a Typology According to Local Embedding

According to the outlined picture of demographic and economic development in the Alps, moving to the Alps today can be classified into seven types of mobility, which covers a range between occasionally tourism and migration (see Table 15.1). In the rural areas of the Alps the more tourist types of A, B and C prevail and the peri-urban type E dominates the piedmonts and in the Alpine agglomerations. As there are different forms of embedding of the new in-comers with their chosen place of residence, and as this relation between in-migrant and hosting municipality is crucial for the further regional development, it is proposed to name only this F type as 'amenity migration'. In this proposal the main criterion for definition is not the type of staying, but the type of relationship between in-comers and their destination communities. Therefore, amenity migration comprises mainly the permanent resident, but may also be appropriate for some intermittent or seasonal forms, however, not daily. It is also true for some job seeking, as it includes well-qualified professionals who are able to choose job and working place also for reasons of amenities. People who move as seasonal workers

Table 15.1. Types of mobility into the European Alps.

Type	Characteristics	Municipalities most involved
A Classical or specialized tourism	Winter or summer foreign tourists accommodated in hotels or second homes (let or owned ones). It typically lasts a weekend to 2 weeks.	Villages, spa resorts, sport resorts
B Seasonal work	Working in Alpine pastures, especially by young urban people to get in deeper contact with Alpine culture, and considered more as a life experience than for financial gain. Lasts 3–4 months.	Villages and pastures
C Second-home residence	Focus of residence remains in the town, with second home being occupied regularly for some days or some months. It may be inherited or bought.	Villages
D Third-age migration	Retirement offers the possibility to change place of residence. This may be the return to the natal mountain region, going to the place of familiarity during regular vacations, or a new place with good climate and image.	Villages, small towns
E Peri-urbanization	With metropolitan areas nearly all situated in the peri-Alpine perimeter, peri-urbanization concerns mainly the Alpine piedmonts within commuting distance.	Small towns, villages
F Amenity migration	Coming from the plain and choosing a place in the non peri-urbanized Alps to live and/or work (also international locations).	Small towns, villages
G Economic and political migration	Coming from abroad to work seasonally in tourist industry, due to poverty or as political refugees.	Tourist resorts; places assigned by administration

(mainly in tourism), migrants due to poverty or refugees should also be considered a particular type; here G.

Consequences of the Demands for Sustainable Development

The interest of peri-Alpine populations lies in the contradiction of preserving landscapes while using them. The interest of the mountain inhabitants lies in the contradiction of maintaining control over decisions and the necessity of new forms of land use through which other interest groups obtain more power. Amenity migration processes embody these processes of economic and cultural change by bringing new destination products and a new form of spatial division, and certainly these phenomena will increase with ongoing human mobility. It will be necessary to balance this development with the guardrails of regional planning, knowledge transfer and local stakeholders' participation:

- Mountain regions cannot be self-sufficient because of specific higher value added in metropolitan regions. Therefore, they can only contribute partially to a national economy. This economic gradient should not be sharpened. In-migrants may be positive in this sense but only in a limited way. It should also be accepted that payment to mountain regions remains necessary for their amenities, which they deliver to the whole society.
- Amenity migration must not lead to more consumption of land for settlement and related transportation. The characteristic exclusive mono-functional land use, which generates higher real estate profits, but also higher resource consumption, should be stopped. Attractive regions with high in-migration should be developed as urban ones and not attempt to be pseudo-rural.
- Amenity migration will be sustainable if there are not only the raisin-seeking reasons (sun, climate and quietness) for in-migration. Instead, it

should strengthen the 'urban' element in the Alps, i.e. in-migrants becoming part of a community not only for seasonal highlights but sharing local cultural life, exchanging cultural experiences and producing and consuming local goods and services.

- Mountain regions have much tacit knowledge about past development, but they know little about the needs for new global knowledge, about the knowledge society's short- and long-term trends, etc. They need advice while establishing a developing strategy for amenity migration, and they need the specific knowledge that in-migrants generally have and should give to the community.
- Amenity migration should be seen in the context of economically balanced regional development, creating mixed societal structures with active citizens and creative stakeholders. Primary efforts should be made to keep inhabitants in the region after their external knowledge enhancement to avoid 'brain drain'. This should include helping people willing to re-migrate.
- The integration of in-migrants will be encouraged by giving them local duties and rights and their participation in municipal decisions, including the local communal right to vote. This right should be extended also to foreign residents after some time.

Conclusions and Expectations

Amenity seeking in the Alps is mostly comprised of daily, intermittent or seasonal forms without losing physical contact with the larger, mostly outer-Alpine towns. Because of this, attachment to social life and regional development seems to be more of an enlargement of metropolitan area into the Alps than contribution to increasing Alpine development potential. Therefore, here the term 'amenity migration' is proposed as mainly referring to the permanent form of amenity-seeking resettlement. Intermittent or seasonal forms are more similar to tourism. However, a few, narrowly defined, intermittent or seasonal forms should be included, such as when there is strong attachment to local society, promotion of regional innovation or input of external know-how.

A non peri-urbanization-driven amenity migration is still a marginal phenomenon in the

Alps, and the reasons for this can be summarized as follows:

HISTORIC PATH OF SETTLEMENT STRUCTURE AND TRANSPORTATION SYSTEM. Accessibility and nearness to the peri-alpine metropolitan regions make possible a quick shift between metropolitan area with jobs and 'nature-near' residence for leisure. As agglomerations and metropolitan areas are relatively small, they have to date maintained and even increased their agglomeration advantages without significant disadvantages.

HISTORIC PATH OF POLICY, URBAN HIERARCHY AND REGIONAL COHESION. The territorial policies of the European countries are comparatively focused on equilibrated polycentric and cohesive development. As there are no real empty areas, towns not only have the network function of urban economies but also the political supply function for the rural hinterland of their region. In small towns, this supply function was in the past a certain guarantee to remain in the urban system. In this context, towns highly specialized in residential functions are not seen as an advantage or a sustainable option.

PERSISTENCE OF THE TOURIST PRODUCTION SYSTEM. The economic structural change from agrarian society took place by developing the tourist industry. And while in recent years there has been some decline, to date the tourist production systems maintain their dominance in the most attractive regions and want to develop new specializations such as health and wellness. If conversion is discussed, other non-tourist service sectors are preferred and not the private services of leisure and residence.

As amenity migration is yet only a selective phenomenon, it is expected to increase:

- In the framework of ongoing technological and organizational decoupling of residence and work place.
- With strong dependence on personal available income from different sources (rents, pensions).
- With changing images, cultural models and life perspectives in which the seeking of amenities becomes more and more important.

Perhaps this will happen with the similar swiftness that occurred with changing fashions of tourist des-

tinations. It is plausible that after a strong demand for Alpine amenities, demand for new destinations turns to other places in the world. Future development of this phenomenon will surely be strongly influenced by the price of energy and its availability, along with the forced political discussion of sustainability. Societal aims will be defined depending on which of the following two patterns dominate:

- A move to concentrated productivity and concentrated amenities, which will also gain 'economies of scale' for natural amenities, such as landscape and wilderness. The disadvantage of this solution is, because everybody wants it, it will be soon overexploited; or
- A 'suboptimal' solution with the acceptance of a kind of hybridization with lower standards, but lower costs of mobility and higher diversity in the long run.

In the long run, the second solution seems to be more sustainable. Choosing it, the mobility in change of residence would be reduced and must be well planned. A change of place would not be impossible, but also not be a mass phenomenon. In some cases the expected positive regional impacts would not take place because of missed opportunities. But also, overestimated expectations would not be fuelled and the pressure on municipalities to act as private enterprises to attract inhabitants and economic growth would be diminished. Also, the second solution would decrease the existing restricted understanding of ecology, one that only incorporates the visible amenities of one's own near surrounding while accepting its negative outcomes: consumption of energy, high cost of transportation (pollution, land use, accidents), urban sprawl and low social standards.

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16 Second Homes, Work Commuting and Amenity Migrants in Norway's Mountain Areas

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Introduction

Norway is celebrating 100 years as an independent nation. In 1905, the country was among the poorest in Western Europe, and today is one of the wealthiest. One hundred years ago people were leaving the mountain areas and the valleys, either for America or for the larger domestic towns, in the hope of employment and a higher standard of living. Urbanization was only beginning then, as just a few were living in towns. Today close to 80% of Norwegians are living in urban areas according to the Nordic definition (Engelien and Steinnes, 2004).

The mountain areas of Norway have always played an important role both for the national economy and in the development of Norwegian culture. Thus, maintaining mountain communities has been an important part of national population strategy. Therefore, when last autumn a governmental committee, Distriktskommissjonen (2004), presented a 'White Paper' on stimulating local economies and entrepreneurship in the rural areas of Norway, it was understandable that while its official aim is to stimulate population growth in the rural areas, in reality the greater objective is to reduce potential depopulation. This author contributed to the committee's deliberation on 'tourism development' in the same areas, and some of the material in this paper on a closely related subject, amenity migration, is taken from that contribution (Flognfeldt, 2004).

Throughout their history, Norway's mountainous areas, especially the upper parts of its southern valleys, have been populated with people partly retired from ordinary work. For farmers, additional productive employment came from the summer farming system (Daugstad, 1999; Daugstad and Sæter, 2001), and later small camping sites made commercial accommodation an additional occupation. Also, selling or renting lots for second homes brought in further income. This allowed farmers to retire from working full-time at the farm, hand over the farm responsibility to their sons (today also to daughters) and just assist during peaks of the work load.

Norway has registered out-migration from its mountain parts for centuries and many mountain communities have been threatened with depopulation. A bettering of welfare for farmers in the 1970s, along with improvement of social welfare, halted this trend and even gave some educated women a reason for staying in their home valleys. In addition, some people are moving into or back to these mountains, not to make a fortune, but rather for a mix of reasons. To understand these reasons and their consequences is the main subject of this paper, and will be approached as follows:

1. History of migration and semi-migration to Norway's mountain areas.
2. Second-home development: phase 1, a historical overview.

- 3. Second-home development: phase 2, the status of today
- 4. Positive aspects of amenity migration: four cases.
- 5. Future challenges.

Definitions of migration and modes of travel are well expressed by Bell and Ward (2000) in Fig. 16.1. But if in-moving people to a destination area is the focus, Moss (2004: 21) gives the following useful explanation of what separates ordinary tourists from amenity migrants:

Tourists typically visit without the intention to reside or earn a living in their destination. Amenity migrants however, intend to settle in their destinations, where they reside permanently, seasonally or intermittently. The first type reside

most of their time in high-amenity place; seasonal ones reside there for one or more periods in a year, such as for Summer, the ski season or the Opera season, and the intermittent type move among their residences more frequently.

To this identification should be added Flognfeldt's (2002) concept of 'semi-migrants', which he uses to identify and describe second homeowners who frequently use their mountain houses.

Moss (1994, 2004), along with authors like Halseth (2004), describe cases where amenity migration has caused unwanted problems to local communities, such as bringing in new habits and lifestyles that are in conflict with traditional ways of life, and may also be exploitative and degrading of local natural and cultural resources. This, of

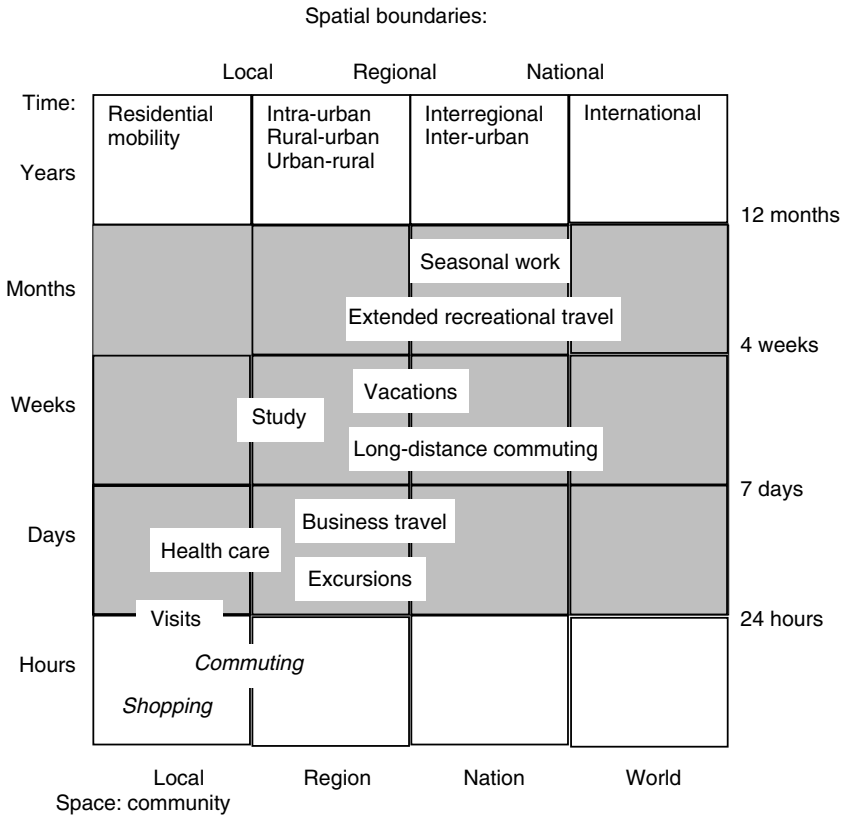


Fig. 16.1. Population mobility in space and time. Source: Bell and Ward (2000) (Taylor & Francis Ltd, <http://www.tandf.co.uk/journals>).

course, also occurs in Norway; many locals fear a decline in local traditions like summer-farming, speaking local dialects and keeping the folk-music traditions alive. But, as often, amenity migrants can be a local advantage, and if managed well the destinations will be better off if such in-migration is encouraged. The Vågå case, discussed later, shows how a municipality is encouraging such a result. In-migrants are also coming as a result of national modernization strategies that often introduce new ways of understanding how to survive through old challenges, such as introducing risk sports like rafting and snowboarding as leisure activities.

Modern Living in the Mountain Areas of Norway

The mountain areas of Norway have much in common with similar communities elsewhere, but at the same time have distinguishing characteristics. The considerable authority of Norwegian local governments at the municipal level is important, and they offer the following attributes to in-migrants:

- Rural mountain regions are able to provide a high level of education up to high school within a governmental school system that is of the same quality as the rest of the country. And very often classes are smaller in the countryside, which is often regarded as a privilege by many in-migrants.
- Culturally, the municipalities were strengthened in the 1990s by turning their 'music schools' for children into more general 'culture schools'. These schools are an important vehicle for continuously maintaining local traditions.
- Modernization of agriculture and forestry created increased possibilities for a person to have at least two jobs; one off the farm. Even small landholders and smallholders have access to new work-saving technologies.

However, not all is idyllic in Norway's mountains. In particular, there are some negative results of receiving in-migrants without local roots or enough knowledge of local culture:

- *Impact on local dialects* – many rural Norwegians are today proud of speaking local dialects. With an influx of people with no connection to the dialects, many locals fear a change in speaking

them. And the use of these local dialects is often closely connected to much of the local cultural heritage.

- *Alcohol and other substance abuse* – even if the amount of such abuse is far lower than in the cities, some in-migrants may bring these bad habits with them. This is to date, however, only a problem with a minority of the newcomers.
- *Higher demand than usual for some goods and services in an area* – some more-affluent in-migrants in particular want things that locals have never asked for, and these can be expensive to provide and detrimental to the local environment if they cause changes of local habits.

In addition to jobs in local government and health care, tourism has been one of the main occupations for those in-migrants also seeking income, although not always full-time. And today part-time tourism employment has been expanded to a wide range of occupations, and thus a wider range of people have chosen to settle outside the larger towns and cities. There is, for example, a demand for well-qualified nature guides or highly educated museum employees, often on seasonal contract. This chapter will examine both the tradition of such settlement and the new possibilities of living at least as a semi-migrant in those mountain areas.

There may be many reasons for migration into the mountain areas, but the following three appear common among amenity-motivated newcomers:

- *Re-migration to inherit a family farm* – the farm will often be a new home for a family or at least a generation. To make this a success, however, there is a need for more than the presence of just farm work, as most mountain farms are not large enough to provide full-time employment for one person. Many of the younger generation will often restore heritage farm buildings to be able to work and live in as modern a fashion as in town, yet in a desired heritage atmosphere, including a cultural landscape in the natural environment.
- *Farm and smallholders estate purchase in a desirable location* – sometimes as a 'double-home' strategy. Previously these farms were mostly holiday places, but today more and more of an owner's work-time is at this location, often a result of new communication technologies. Farming in these cases is mostly on a hobby basis.

- *Semi-permanent moving to a second home* – often in connection with sports and hobbies; this type of move is not permanent. The longer visits are typically from 40 to 110 days a year and shorter ones of 3 or 4 days, so-called ‘oval weekends’.

For Norwegians the number of days away from ordinary work has expanded considerably during the last two decades. This is due to new ways in which many are able to organize their work time. Today, legal holidays are 25 workdays, and 30 for those 60 years of age and older. In addition, up to 24 workdays annually may be changed to holidays as compensation for overtime work (if not otherwise compensated for). The result is, if you want most of your free time to be dedicated to staying at your second home, up to 10 full weeks may be spent there. And even commuters living in the mountains have that many days to spend at home. In addition, there are the days one may stay at the second home while actually working. For some there may be an agreement with the employer of a workday every week away from office. Second homes built during the last decade often have an office room equipped for electronic communication.

Second Homes: Phase 1

A historical overview of semi-migration to mountains in Norway

Most mountain second-home areas began as houses on summer farms or directly connected with mountain farms. Langdalen (1965) described the development of cabins in connection with summer farms (*setre*) as a sequence, starting with the need of additional grazing land in the mountains and ending with previously summer farm areas now totally dominated by hotels and cabins in a way that there is no longer grazing cattle. This is mainly the situation in Norway today, even though some regions still have active summer farms (Daugstad, 1999; Daugstad and Sæter, 2001).

A good description of the types of holidays that second homes fit into in this Phase 1 is found in Löfgren's (1999) excellent work on Scandinavian vacation patterns. For many years they were all-inclusive family activities, mostly strongly connected to nature-, environment-, and

farming-dominated vacation patterns. In a paper based on interviews among second-home or cabin owners in Langmorkje, common in the mountain municipality of Vågå in the Jotunheimen Mountains (an area described later in this chapter), Kaltenborn (1998: 121) gives an important explanation of both traditional second-home ownership and the affinity to mountains of many Norwegians:

Nature plays a central role in Norwegian culture. The way Norwegians relate to cabins, or recreational homes – whether they are found in the mountains, forests, or by the coast – is part of this picture. Through several generations recreation homes in different environments have played a salient role for outdoor recreation and contact with nature. For many, recreation homes also provide an opportunity for acting out a particular type of lifestyle for shorter or longer periods of time during the year. Recreation home use can also be a way of maintaining contact with places, which represent family attachment, after one has left an area.

A long coastline and mountains dominate Norway, and most Norwegians can reach a mountain area in less than a 2-h drive. Most of the mountain valleys are populated and considerable agricultural production still takes place. Animal husbandry is most common, but some grain and potatoes, plus more specialized crops like herbs are also grown. Many of the farms also either have their own forests or are part of state or community commons (*almenninger*), so they have access to forestry products.

Above the valley, high in the mountains, summer farms have for a long time played an important role in the extended farming system. These farms are part of the main farm down in the valley and the lots either are on private land or have a ‘traditional lease’ on common grounds. Some farms have two or three summer farms in the nearby mountains, the closest one named ‘spring summer farm’. The grazing in the mountains gave access to important grassland during summer, while grass production down in the valley was harvested and kept dry for use during harsh winters. The buildings of those summer farms consist of a living hut, a cow-stable and a summer barn to dry grass. Today sheep are the main animals in the mountains, but young cattle are also found. This gives rise to a very strong conflict in Norway between grazing domestic

animals in the mountains and wildlife, such as bears, wolves and wolverines. Although wildlife is protected from normal hunting, they may be hunted if found killing domestic animals (Daugstad, 1999; Bryn and Daugstad, 2001).

When a family member moved away from the local community, in the traditional 'odel' system they often received a hut site on the summer farm area as a gift from the father when the older brother took over the farm. This was often the start of second-home usage: visiting one's own hut connected to the summer farm of one's family. Of course, many of these second-home huts were later sold out of the family. And since they were located so close to the functioning summer farm, conflicts sometimes rose between second-home users and farmers. Most contentious was the late evening noise of the visitors, since the local summer farm maid had to be at her chores early in the morning. But there were also many examples of second-home dwellers taking part in hay harvesting and the search for lost cattle as a part of their holidays.

Between the two World Wars, and until late in the 1960s, less well-off families in the cities took their 2 or 3 week summer holidays 'out in the country' as non-paid workers. Often this included a longer stay for the non-working family members. Work was taking part in harvesting hay, berries or vegetables, and payment was free meals and accommodation. This was regarded as a very healthy form of holidaymaking. Often the same family returned every year to the same farm, and when such families became better off in the 1960s, they wanted to buy a small cottage as a holiday home either at the farm or in the surroundings.

Kaltenborn (1998:133) talks about 'the cabin as an alternate home in the late modern society':

Today's use of recreational homes can be seen both as a reaction and an adaptation of modern processes. Globalisation of different kinds can be perceived as a threat against cultural and national identity and local systems of meaning. One example is the fast-growing business of international nature tourism, which makes extensive use of Norwegian nature. Strengthening the cultures of recreation home use and use of natural areas in general – for example by summer farming in the mountains, extensive grazing, and grass harvest in outlying pastures – are possibly also territorial actions with respect to competing national and international interests.

Langdalen (1965) sums up the above condition nicely with his observation that the summer farms changed from just being a part of agriculture to a multi-functional opportunity. Maintaining traditional summer farming while at the same time, and in the same space, developing new tourism products was important. In the Valdres Valley of the Jotunheimen Mountains today there is a large modernization project, which shows a large number of such multi-functional holiday making along with traditional summer farming (Regionrådet for Valdres, 2004).

Second homes and amenity migration

As described above, second-home use in the form of cabins has a long tradition in Norway. Called 'hytte' they were generally small, rough cottages or huts without water and electricity located in the mountains, forests or coastal area. This was typical of Phase 1 of Norwegian second-home ownership up to the 1980s. Today 'second-home' covers a great variety of building type, and according to Statistics Norway about half the families of Norway have access to a hytte. 'Access' here does not mean ownership, but possibility of use. One either owns one, a senior family member is the owner or one has permanent permission to use it (Statistics Norway, 2003).

As noted above, Flognfeldt (2002) defines second-home usage as a form of 'semi-migration', where, in Norway, the owners typically reside for between 45 and 100 days a year. Commonly there are a number of trips, or semi-migration movements to the same site, which may be termed second-home use or work commuting, and when the movement becomes more permanent, amenity migration (see Fig.16.2). Use is manifest as:

- *Traditional use of second homes* – for visits during holidays or weekends either in the mountain areas or along the southern coastline.
- *Previous farmhouses as second homes* – often connected by earlier family ties, and although there is no active farming, small crops may be produced for personal consumption (potatoes, vegetables, berries, etc.).
- *Traditional summer farms (seter) with new uses* – see above description.

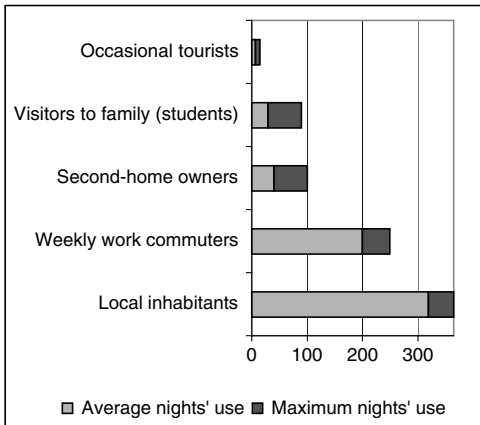


Fig. 16.2. Pattern of stay (including use of home) by visitor type and local inhabitants to an area. Source: Flognfeldt (2001).

- *Ski Resorts* – mainly for Alpine skiing, but most also facilitate Nordic-style skiing.
- *Permanent location in recreational or other rural areas* – often a move ‘for the children’s sake’, a push from what parents consider the unhealthy environment of larger towns.
- *New challenges for those buying farms for new uses* – general amenity migration, but focused on new types of work, not local subsistence production.

Since the 1960s, many more Norwegians have gone on to higher education. Initially this referred to high school, but in the 1970s, college and university. This means that many people had to leave the mountain areas for larger towns to obtain work they were qualified for. Many of them, who had family farms later to be inherited, became ‘temporary migrants’ who established urban families and urban employment. But family and farm ties were still so strong that they were expected to take over the farms when their parents decided to at least ‘semi-retire’. These conditions result in ambiguity of ‘residence’, even though in Norway ‘local identity’ is commonly defined as where one pays municipality taxes. This should be the site of one’s permanent address for at least 183 days a year. And commuters with family have a permanent address where the family members stay permanently.

According to Statistics Norway, the exact number of ‘official second homes’ in January 2004 was 368,933 (see Fig.16.3). Oppland county, in the Jotunheimen Mountains, had 41,000, while other mountain counties in the eastern part of Norway, namely Buskerud and Hedmark, had 40,000 and 30,000 respectively (Statistics Norway, 2004).

The dense second-home areas are along the southern coastline, close to larger cities and, most important for this paper, in the mountain valleys of eastern Norway. The access from the Oslo area and the coastal towns to this mountain range is within a weekend travelling distance of 3 h from work place and permanent residence. Such travel time is most common, but some types of amenity migrants will accept a much longer trip due to the nature of their work. For instance, workers on the offshore oil installations in the North Sea have a continuous work period of 2 to 3 weeks and a longer recreation interval away from work.

In addition to conditions reflected in the official statistics, many Norwegian small farmers and smallholders are only working part-time on their farms and many commute to their farm. These are mostly living on farms without domestic animals, or they only have sheep grazing in the mountains during summer. The following are common combinations of occupation for such farmers:

- *Civil servants, including hospital and social workers and educators* – for example, among the scientific employers at Lillehammer University College several have farm connections.
- *Transport, construction and industry workers* – especially people who work on hydroelectric dam constructions, road and railroad improvements or in industrial or oil production plants.
- *Service workers* associated with tourism, employed in local groceries and shops, banks, etc. The demand for such employment is often higher during summer in seasonal tourism areas (Flognfeldt, 2001).
- *Workers on other farms* – such as ‘farm assistants’ (avløser) organized in Norway to provide farmers with legal holidays.

Each farming family has their on-farm working schedule, and at least one person in the household will have some income from the jobs described

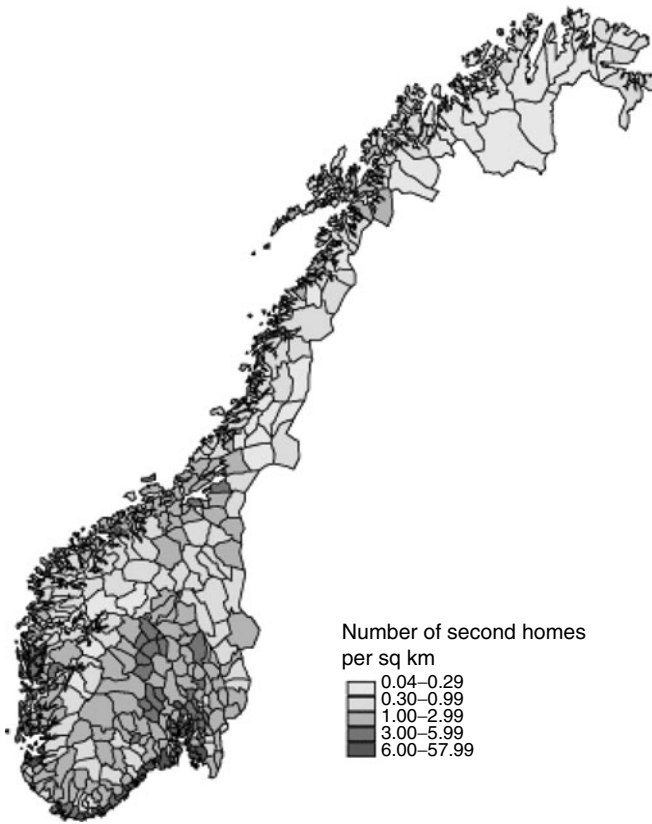


Fig. 16.3. Density of second homes in Norwegian municipalities per sq km, January 2004. Source: Maps Norway (Kartdata Statens Kartverk) (2004).

above. Most of such jobs are based on the traditional structures of labour in rural areas, but governmental jobs have also expanded, especially in the social welfare sector. Some new amenity migration has been made possible by the demand for other types of employment, in tourism often associated with ski resorts, but also in other sectors, such as:

- *Oil-production workers*, who are mostly on sites in the North Sea, but while their actual employment is not located in the mountains, well-qualified ones may settle there.
- *Finance experts*, who work for investment firms and as finance consultants elsewhere and frequently use the internet and telephone.
- *‘Free workers’* like artists, architects and estate developers, lawyers, consultants, researchers etc., who need not be present in an office daily.
- *People working partly ‘on the road’ outside their dwelling area*, such as musicians, opera singers, theatre workers, politicians, etc.
- *‘Ski bums’, seasonal chefs and other cuisine workers having at least one seasonal job in their dwelling area*, and others who work intensively for longer periods than normal and then have long holidays.

They use their dwelling area as a base and additional employment out of season.

- *High-skilled, high-tech service people*, who work to varying, but significant degrees ‘on-line’.
- *Retired or semi-retired persons*, often couples, turning their previous second-home location to a permanent one, but often still with some seasonal or part-time jobs.

Some 15 years ago when personal computers were entering the Norwegian rural areas, many thought that low-paid manual computing work would be put out to firms in these places where costs of living were lower. This never happened in Norway, and today such work is outsourced to other countries such as India. However, flexibility between work place and customers has changed the need for an office very much. For example, some ski resorts report that they have ‘Tuesday–Thursday inhabitants’, meaning people who go to their main office on Tuesday morning and return Thursday evening, and thus spend three workdays a week at the office and the rest of the week at their rural home.

Quality of rural life, including in the mountains

Today Norway has a high standard of living, even in rural areas. Close to every sq km in inhabited areas is covered by electricity and TV capability, and also mostly by mobile phone access. Many places today in addition have access to ‘broadband internet’. This means that many types of work can be executed almost everywhere in Norway. Also, there is fairly good road access to most places, and often high access to air travel, which means that personal face-to-face contacts with ‘clients’ can easily be arranged. Of essence is managing the meeting place. Therefore, the choice of ‘where to live’ is typically no longer dependent on one’s work, but rather on other things like the environment for raising children, hobbies and the natural settings of one’s home. In addition, family farming affiliation can be stronger.

As mentioned earlier, education systems are developed in most rural areas. But since those areas with few schoolchildren are threatened by possible closure of local schools, with changes in the municipal economy, local inhabitants are hoping that new families with children will move

in. Some communities are offering incentives to in-migrants with schoolchildren.

For most of the in-migrants to the mountain areas, the natural environment is an important, if not the most important, reason, as well as the availability of at least half-time employment. This is shown particularly in the generation change project of Vågå (see below).

Here is a compilation of the principal motivations for people to move into Norway’s mountain areas:

- *Being closer to nature* – general interest in living adjacent to or in wilder natural environments.
- *Being proximate to outdoor recreation amenities* – living in the mountains for skiing and other recreation like rock climbing. Also, in places sailing, golf, etc. (see especially McMillan, Chapter 3, this volume).
- *Space-claiming activities* – hobbies or occupations that are difficult to do in towns, such as horse riding, hunting, shooting, owning and managing many dogs, etc.
- *Living a rural lifestyle* – not so many as when the ‘hippie generation’ had its peak, but eco-farming is today a much more serious occupation than before, especially since this production type is now supported by Norway’s agriculture policy.
- *Growing own food* – vegetables and fruit growers mostly locate in coastal areas; however, there are many crops grown to higher quality due to the purer mountain environment, for example herbs and potatoes. Also, agricultural scientists have enhanced growing possibilities in more arid environments.
- *Cultural amenities* – more traditional way of life, including local cuisine, is a reason for moving to some mountain areas. In some areas there has been an attractive focus and promotion on ‘the kitchen of the nature’.

Second Homes: Phase 2: Illustrative Cases of In-migration Today

A short description of four cases of the actual ‘result’ of Norwegian in-migration to mountain areas, amenity migration included, are outlined below. They are chosen by the author partly because they are representative, but also because they are taken from either his research or consulting practice.



Fig. 16.4. Resort area of Kvitfjell, Norway with resort accommodation and private homes (photograph: courtesy of Kvitfjell Olympic Downhill Venue, March 2003).

Recreation migrant working in high-paid free trades

As mentioned above, internet access and computing is very well developed. The new Alpine ski resorts are usually equipped with every possible access included the latest in broadband technologies. Their new ‘cottages’ are built above the average housing standard in Norway, and often contain a high-quality workspace, most often a complete office. This is what this author regards as Phase 2, second-home development in Norway (Fig. 16.4).

A significant problem is market access, but since many customers would like to come to the resort within the context of a business trip, the resort-oriented localization is attractive. Some amenity migrants working at least part time, however, do need to move once a week or so to Oslo, or other towns, for business meetings.

The advantages are many. Among them are:

- Considerable possibilities for outdoor recreation like skiing, so that second homes in ski resorts are the type most in demand in Norway today, along with those in southern coastal areas.
- Children may attend a local school with fewer problems, such as violence or drug abuse. As said previously this is one of the main reasons for moving away from cities indicated by migrant families.
- Possibilities for owning larger real property, for having a horse, etc., as the cost of acquiring such property in the more central areas of Norway is comparatively extremely high. Those larger units are often situated on the fringes of Alpine resort areas or some minutes away by automobile.

Along with a general attraction of comparatively high-quality nature, the combination of employment possibilities, good school environment, recreation facilities and larger lot building options may sum up reasons for moving. Taking over a family farm should be added to these, but not every family has such an opportunity. If one does not have a family farm, the cost of buying a new house is high, especially in high-pressure areas like ski resorts. Many in-migrants, however, are both selling an attractive property in the towns and bringing high-paid work possibilities with them. This may add up to a surplus to be

invested either in a higher standard of life than in the towns or in the possibility of working less.

Moving 'home to your roots'

Moving back home seems particularly important in Norway, and may or may not be primarily for the natural and cultural amenities of the old residence. This has not yet been carefully researched since most studies to date are on second homeowners in general (Kaltenborn, 1998). Many persons brought up in rural areas had to go away for their education and initial employment. If parents had a family business, farming or other, it typically did not provide sufficient income for two families, or parents wanted their children not to return until they had wider practical experience. As long as the parents were young they did not want to 'let the younger ones take over'. When, however, the parents want to retire or slow down, the situation changes. And even on small mountain farms there are many tasks the older generation can still manage. And so when the younger couple wish to take some days off, or even have a longer holiday, the older ones can step in. In addition, some skills that the returning migrants have acquired during their urban stay may have become in high demand in the local community. Through interviewing in-migrants about their formal and informal skills local development officers can create an 'entrepreneurship assistance network' of high value. Some of these skills are described in the next case.

The Vågå 'generation change' project

The municipality of Vågå is situated in the Jotunheimen area, with the highest mountain range in northern Europe and elevations exceeding 2000 m. This municipality has for some years tried to stimulate in-migration, and in 1997 established the 'Generasjonsskifte' project to promote both in-migration and re-migration. A project coordinator was engaged and a steering committee set-up, along with a scientific group to support the committee. Among the initiatives formulated were the following key incentives:

- *Buildings flats for young and single in-migrants*; since almost all existing accommodation was either

farmhouses or villas there was a need for a more town-like form of accommodation in the municipal centre. This lack of small flats or apartments is very common in such rural areas.

- *An 'enterprise-court' for entrepreneurs and in-migrating companies*, to provide common services for small companies. This is a part of a national business garden strategy of such courts ('næringshage'), set up to help entrepreneurs wanting to establish new or extended businesses in rural areas.
- *A national annual 'rural development conference'*, which today is one of the regular conferences for the members of the mountain region's ('Fjellregionen') municipalities and businesses.
- *Cultural improvements* to make the municipality more attractive for new or relocated businesses. An important change was the rehabilitation of the old community house, a traditional meeting and exhibition building, which was made into a larger and more flexible multi-cultural building with café, theatre scene and seminar rooms. A well-known photographer with strong connection to the community, Morten Krogvold, decorated many of the rooms.

Another strategy, however, is to make full use of in-migrants and semi-migrants to stimulate local entrepreneurship. In Norway, as probably elsewhere, many entrepreneurs have sufficient knowledge to produce items. What they often lack, however, are skills in marketing, accounting and management. An in-migrant having both some management and/or marketing experience is added to the board of a newly established firm. Such people can function as both valuable mentors and 'door openers' to markets in their permanent or previous living environments.

However, not everyone regards all types of in-migration to these areas as positive. The community of Vågå is a very traditional one with many old farms with lofted log buildings, and a substantial number of those are owned by people from outside, mostly extremely wealthy persons. An example of their behaviour is that of Petter Olsen (one of Norway's wealthiest persons), who bought a large forest lot and gave it to an environmentalist group to be managed as a protected area. Urban people and some locals applaud this action. Other locals, however, say that this was just done to preserve the magnificent view from Olsen's old mountain summer farm, now acting

as his second home. They would have preferred to have access to the protected area for establishing their own second homes.

The Gardmellom Festival and Norwegian Heritage Foundation

If an area becomes an amenity migrants' 'hot spot', and at the same time has a high level of local cultural awareness, the conditions for cultural entrepreneurship are usually favourable. A good case is the cooperation between Norwegian Heritage and farms in the Gudbrandsdal Valley, which resulted in the Gardmellom Festival. For 3 weeks every summer heritage farms in the valley are used as showcases of visual arts, speciality food, music and just about everything in connection with built heritage. The Norwegian Heritage Foundation describes itself as follows:

Norwegian Heritage (Norsk Kulturarv) was founded in 1993 by Oppland County Council. Later almost thirty co-founders have signed up – among them public authorities such as counties and municipalities as well as representatives from trade and industry. The idealistic purpose of the foundation is to preserve our cultural heritage. In practice this means preserving history by help of historical vitality. It is our task at Norwegian Heritage to see to it that the historic environment of Norway is properly cared for. Our strategy in this matter is to create trade value from our cultural values – to maintain them for the present and the future (Norwegian Heritage Foundation, www.kulturarv.no).

Even though many of the founders of Norwegian Heritage are locals from the mountain areas, they have been stimulated by amenity migrants with strong cultural interests. Among the visitor groups to many of the events, amenity migrants play important roles especially as buyers of crafts and art, and they mingle very well with culturally interested locals and some ordinary tourists who were lucky to find the way to the festival venues.

The festival is followed a week later by another, the Peer Gynt Festival. It is dominated by mainly outdoor theatre, song and music. The summit of this festival is the outdoor presentation in the mountains of Henrik Ibsen's national play 'Peer Gynt' in an environment

close to where the original Peer lived some 100 years ago. This play is sold out for about 10,000 spectators every year.

Summing up the cases

Some amenity migrants are really contributing to the enhancement of local culture. They may be active volunteers working in local museums and heritage sites, participating in local music groups and choirs, and among these migrants are several 'actors' who prefer to work in a calm and inspiring environment. The ambience these migrants create also appears to be one that generally promotes the sustaining of local environmental quality because of their interest in keeping and maintaining valuable tradition and at the same moment being able to understand modern society.

Future Challenges: Living in Two Places

Traditionally, a second home for most Norwegians was a much more primitive dwelling than the permanent one. Only the real upper classes, a few in Norway at that time, had access to second homes of high material quality. Today the differences between a second home and a 'permanent home' are fading. Today, many persons are in a 'double home' situation. The reasons for this may vary, and while considerably more research is needed on this subject, the following factors appear to be important ones:

- *Commuters with farm access* – smallholders and farmers not in the animal production business have a 'work-time home' where their workplace is situated and also a rural home.
- *Recreation access* – in mountain areas, particularly for downhill and cross-country skiing, along with hunting, fishing and other outdoor activities.
- *Following family traditions* – if a farm has been in the family for centuries the children often feel obliged to return and take over the farm. Related heritage farms open to visitors is one of the well-promoted strategies of Norwegian Heritage Foundation.

- *Slower pace of life seekers* – unlike in Šumava, Czech Republic (Glorioso, 1999) and similar conditions, in Norway there few such persons, due mainly to restrictions on buying even small farms. Up to now family members are legally preferred for taking over farms, and then neighbours may buy the farmland prior to in-migrants. These restrictions, however, have been liberalized since 2003, but there has not been any examination of the results of that policy shift.
- *The gender structure* – is also important, since 25-year-old women in Norway today have a substantially higher education level than men, so the women need more jobs based on education than the men.
- *School access transport for those living away from main roads* – the municipalities are responsible both for lower-level schools and for transporting of children to those schools. A substantial growth of in-comers with children may be a financial ‘burden’ for the municipal economy in the short run. Of course, most long-term effects will be regarded as positive.
- *New agriculture policies* – until now Norway has had an agricultural policy based heavily on subsidies. This helps keep people residing in rural areas. And it is also part of a national and local security strategy, for if war or catastrophes occur access to local food production would be important.

There are also different challenges for different bodies, such as:

- *Municipal taxation* – today everyone is paying income tax to the municipality of their permanent home regardless of how much of the year they reside there. Many welfare components are the responsibility of the local health authorities, and the cost of giving, for example, medical assistance to older persons when they are staying at their second homes may be high. A change to give communities with high numbers of second homes some of the municipal taxes would not be easy to bring about.

If a mountain region has a positive strategy to utilize the business and cultural competence of amenity migrants these could make a good contribution to the local community. On the other hand, if the strategy is just to settle in-migrants in enclaves of high standard and let them live separated from local activities and concerns, their contribution will mostly be a little negative. Norway needs to pay greater attention to this amenity migration phenomenon, since general international trade agreements are forcing people in the mountain regions to find new creative solutions to sustain their way of life and environment. In some mountain communities enhanced in-migration including amenity migrants will be one of these strategies.

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17 Amenity Migration and Tourism Development in the Tärna Mountains, Sweden

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Introduction

In the late 20th century, many rural areas around the world suffered from economic decline and depopulation (Hall and Jenkins, 1998; Ilbery and Bowler, 1998; Jenkins *et al.*, 1998; Hoggart and Paniagua, 2001; Pettersson, 2002). The internationalization of the economy created an emergence of new patterns of production often favouring urban labour markets and creating further obstacles for already struggling rural societies (Townsend, 1997; Williams and Hall, 2002). This development put additional pressure on the rural labour markets that had already suffered from decline due to increasing mechanization within agriculture and forestry. Growing international competition has caused further cuts in rural manufacturing industries. Also, out-migration to obtain education not available in the countryside or gain better employment opportunities in the urban areas contributes to putting rural areas at a disadvantage. A declining service supply was also a result of this restructuring (Pettersson, 2002; Lindemann, 2004; Löffler, 2004). Hence, rural communities, governments and regional authorities require new directions in rural development (Sharpley and Sharpley, 1997; Hall and Jenkins, 1998; Jenkins *et al.*, 1998; Roberts and Hall, 2001; Hall *et al.*, 2003).

Tourism development is a widely considered remedy for areas suffering from unemployment and out-migration (for example, Hall and Jenkins,

1998; Telfer, 2002a,b; Saarinen, 2003). Indeed, there is evidence that tourism creates employment (e.g. Cavaco, 1995; Müller and Ulrich, 2003). In particular, amenity-rich areas such as mountain areas not only managed to attract tourism but also in-migration (Price *et al.*, 1997; Glorioso, 1999; Fountain and Hall, 2002). In fact, tourism development formed an opportunity for these areas and helped turn some mountainous areas into prosperous regions (Godde *et al.*, 1999). In Europe, the Alps in particular benefited considerably from tourism and, above all, certain skiing resorts became well-known tourist destinations.

However, tourism development does not automatically create new jobs for those already residing in the countryside. New employment in the service sector is not necessarily suitable for those who lost their jobs in manufacturing and production (Jussila and Järviluoma, 1998). Hence, labour cannot generally be recruited from the local labour market, thereby leaving those entrepreneurs to depend on incoming seasonal labour. Analogously, the same can be said for the entrepreneurs themselves (Shaw, 2004).

These interrelationships between tourism development, migration and the labour market are usually treated separately and independently. There is, however, reason to question this conceptualization. It can be argued that migrants and tourists are attracted by the same amenities (Williams and Hall, 2002). Nevertheless, tourists choose to only temporarily visit the area, while

in-migrants relocate their centre of living to the amenity-rich area. Hence, tourism and migration only represent two stages of a mobility continuum (Bell and Ward, 2002; Fountain and Hall, 2002; Müller, 2002). However, it is not really clear to what extent in-migrants are also involved in the tourism labour market. Moreover, whether tourism development has a positive impact on immigration, population development and employment has not yet been subject to much research.

The purpose of this article is to analyse the involvement of in-migrants with the local tourism labour market in a peripheral mountain area. Evidence is taken from the Tärna parish in the Swedish part of the Scandinavian Mountain Range. The analysis is based on a comprehensive geo-referenced database produced by Statistics Sweden and available at the Department of Social and Economic Geography, Umeå University. The database covers all individuals in Sweden and thus allows studying rural change at the micro level. For this paper, the time period between 1991 and 2000 was considered.

Tourism, Migration and the Labour Market

Rural authorities and planners have recently faced two main problems: depopulation and decreasing employment opportunities. Rural areas in the Western world have in particular been experiencing economic restructuring (Sharpley and Sharpley, 1997; Ilbery and Bowler, 1998). The employment decrease in agriculture, forestry and manufacturing due to increased international competition and technical development has been accompanied by cuts in the public sector, also challenging the female labour market in the rural areas and creating an urge for new employment opportunities. Currently, it is widely considered that tourism development might be the last possibility to counteract these problems. It has been regarded as an option for regional and local development for a considerable time (Ullman, 1954; Christaller, 1963; Williams and Shaw, 1991; Sharpley and Telfer, 2002). In fact, particularly within Europe, tourism has meant an enormous redistribution of welfare from northern and central Europe to the Mediterranean area (Williams and Montanari, 1995). However,

tourism contributes to the redistribution of welfare even within countries (Telfer, 2002b).

Besides the creation of employment, the maintenance of population is a key task for rural planners. Hence, tourism development can also be seen as a way of sustaining population figures, and tourism can influence population figures in different ways (Sharpley and Sharpley, 1997; Butler and Hall, 1998; Hall and Jenkins, 1998; Jenkins *et al.*, 1998; Roberts and Hall, 2001; Williams and Hall, 2002).

Tourism development counteracts out-migration from the countryside by:

- generating employment and incomes for rural dwellers
- broadening the service supply
- (re)shaping rural culture and traditions
- re-imagining the countryside towards rural dwellers (not least, the young ones).

Similarly, tourism development attracts in-migration to the countryside by:

- supplying service jobs attractive to outsiders
- creating business opportunities
- upgrading rural environments
- re-imagining the countryside.

Moreover, there are various other forms of mobility not registered in governmental accounts besides in-migration. Hence, Müller and Hall (2003) have argued that the current ways of registering rural populations fail to acknowledge the factual population distribution by ignoring second-home owners and their often rather long visits to the countryside. The same can be said for seasonal workers who never register with the rural authorities. All these groups are driven by similar motivations, but their presence in the countryside is usually invisible for administrative reasons.

Hence, the links between tourism development and migration can be characterized in two ways, i.e. production-led and consumption-led (Williams and Hall, 2002). Tourism development increases the demand for labour in a number of industries serving tourists and tourism service providers. At the same time, lured by rural amenities, in-migrants start businesses as a means of generating income and facilitating a rural life (Fountain and Hall, 2002; Paniagua, 2002). Concerning in-migrants to rural Scotland, Findlay *et al.* (2000) report that a majority indeed

created their own jobs, mainly within the service economy. Paniagua's (2002) study of urban in-migrants to rural Spain presents a similar picture, including a strong involvement in tourism activities.

Nevertheless, it is difficult to distinguish between production-led and consumption-led migrations. Both are certainly intertwined and hence, even migrants to the countryside may have problems themselves in actually stating whether they would have moved to the countryside without having some occupation allowing them to make a living or without expecting better opportunities. Exceptions to this notion are economically independent migrants financing their living using savings, pensions or other incomes, certainly primarily for consumption-led reasons.

Indeed, a regional policy review in Sweden showed that a majority of the migrants stated that they moved for lifestyle-related reasons (Garvill *et al.*, 2000). Only 20% of the migrants claimed labour-led reasons for their decision to migrate. Instead, a change of environment was given as a main reason to move. This applied to both rural and urban environments. Hence, the majority of people perceived that they have chosen their places of living without being constrained by the labour market. Consequently, the vast majority of all households were very satisfied with the migration outcome. Lindgren (2003), who noted in a study of counter-urbanization in Sweden that even the event of unemployment itself is a reason for moving into rural areas, completes this picture.

The Role of Amenities

Although it seems obvious that in-migrants use tourism as an opportunity to make a living, it is not said whether tourism in general entails in-migration which reinforces tourism development trends. Instead, it can be argued that areas attractive to this kind of in-migrants must contain amenities not only attractive to tourists. Graves and Linneman (1979) define amenities as non-traded goods that cannot be consumed without moving to the area where these are available. Favourable climatic conditions and scenic qualities have early been identified as amenities (Ullman, 1954; Price *et al.*, 1997). However,

recently the presence of heritage environments has also been listed as an amenity attracting in-migration of white-collar service labour (Weissglas *et al.*, 2002; Timothy and Boyd, 2003).

In the same way, mountain resorts have managed to attract people to move their permanent residency to the resort. Information and communications technology (ICT) and other technological developments implied what Janelle (1991) calls space-time contraction, dramatically cutting the time needed for travel and communication, allowing a growing number of people to telecommute and reside far from their workplace. Additionally, ageing societies entail a growing share of people independently choosing their place of living. In this context, earlier stages in life may play an important role for the decision to migrate (McHugh *et al.*, 1995). Hence, migration to an amenity-rich area can, in fact, be a return to people's childhood area.

Furthermore, second homes can form a link between the amenity-rich area and the permanent home, finally leading to a relocation of the home to the amenity-rich area (Jaakson, 1986; Müller, 1999; Williams and Kaltenborn, 1999). In some cases, second-home ownership simply represents a link to childhood environment or even a place connected to family or ancestry (Hall and Müller, 2004). In many cases, second homes represent a lifestyle decision of their owners. Second-home owners can perceive second homes as places for creative work. Often, however, second homes function as a retreat to a simpler world. Getting away from urban congestion and alienation and experiencing a different, more pleasant environment as well as a rural society often perceived as more authentic are major motives for second-home ownership. Therefore, Jaakson (1986) argues that second homes are places full of rituals, including the return to the same place and the same activities, and control as expressed by the quest for authenticity and real life.

However, these qualities cannot be consumed without moving to the area where they are available. For some households, access to these amenities means a temporary or seasonal migration, for others the lure of these amenities is so strong that they permanently relocate to places where these are available. In some cases, second homes are purchased to test whether life in a more rural environment really fits the owner's expectations. In other cases, second homes are

used as a part-time solution until more permanent migration is affordable or practically viable. The decision for the one or the other is not only dependent on the position in the life course, but also on family ties and competing projects (Müller, 1999).

Accordingly, only a small number of households attracted by amenities permanently relocate to the amenity-rich areas. An even smaller number become involved in gainful work in these areas, and tourism is certainly only one of the segments of the labour market attractive to amenity migrants.

The Business of Rural Tourism

Besides being an attraction for in-migrants, the presence of amenities also forms a business opportunity that can, in itself, form an important reason for moving into the amenity-rich area. Doubtless, rural areas contain assets attracting tourists to spend their leisure time there. Besides physical amenities, it is the idea of an idyllic and a more peaceful life in the countryside that lures tourists to rural destinations (Bunce, 1994; Roberts and Hall, 2001). However, rural tourism has recently changed. Traditional activities like hiking and cycling have been complemented by modern activities like climbing and mountain biking (Butler, 1998; McMillan, Chapter 3, this volume). Furthermore, second homes continue to be a popular residence during a visit to the countryside, luring their owners to spend a considerable time of the year at their cottages (Jansson and Müller, 2003; Müller *et al.*, 2004).

Hence, authorities and governments promote tourism, mainly due to its expected possibilities to contribute to the labour market (Jenkins *et al.*, 1998). Moreover, multiplier effects are expected to give a positive input to the local economy (Telfer, 2002a). The ensuing growth facilitates a better use of infrastructure, service supply, etc. Additionally, places are profiled and re-imaged (Butler and Hall, 1998); backward areas are converted into modern and attractive destinations capable of sustaining a positive population change.

This ideal is seldom achieved; there are a number of issues that complicate successful tourism development. Partly, these issues can be

related to the available resource base and the relative location of some rural areas near tourism-generating metropolitan areas (Müller and Ulrich, 2003). Parallel developments in many rural areas entail a harsh competition between rural destinations offering rather similar attractions (Sharpley and Sharpley, 1997; Roberts and Hall, 2001). Accessibility and lack of buyable tourist products in the rural areas make it difficult for tourists to spend money (Sharpley and Sharpley, 1997; Jansson and Müller, 2003). Moreover, a poor understanding of tourism and the tourism industry, not least among public stakeholders, contributes to the struggle for accomplishing positive tourism development (Hall, 2000).

An important aspect of rural tourism supply is its structure. Many enterprises are small-scale and lack sufficient economic resources (Page and Getz, 1997; Karlsson and Lönnbäck, 2001; Roberts and Hall, 2001; Shaw, 2004). Moreover, many entrepreneurs' involvement in tourism is more for lifestyle motives than for business reasons (Karlsson and Lönnbäck, 2001; Paniagua, 2002). Thus, they are not automatically interested in developing their businesses. Instead, tourism is considered as a means of sustaining self-determination and independence, in contrast to the ambitions for tourism development carried out by authorities and governments. Those expected to promote tourism development are not essentially interested in doing so. Hence, Hall (2000) requires the presence of a local champion to facilitate successful tourism development.

Paradoxically, tourism labour is also a fairly limited resource in the countryside (Jussila and Järviuoma, 1998). Employment in agriculture and manufacturing has not fostered a service tradition. Moreover, as elsewhere, those individuals who have become redundant are older and not necessarily those most suitable for work in the service industry. Consequently, tourism work mostly attracts young people and women (Riley *et al.*, 2001). Still, men take managerial positions. Accordingly, tourism development is often related to the creation of low-paid, seasonal and part-time work. Thus, it could be argued that tourism development also implies the introduction of a new labour market regime, accepting part-time employment as a satisfying status and public

support as a permanent contribution to the maintenance of local employment (Townsend, 1997).

Methodology

This chapter employs a descriptive approach regarding a major tourism destination, the Tärna Mountains, in northern Sweden and can be characterized as a case study. It does not address the experiences and perspectives of single individuals, but instead uses available statistics to provide information about all in-migrants to Tärna. The following sections offer a description of the applied research methodology.

The empirical analysis is mainly based on a geo-referenced longitudinal micro-database covering all individuals in Sweden from 1960–2001, and located at the Department of Social and Economic Geography, Umeå University. The database is especially designed by *Statistics Sweden* to facilitate the development of micro-simulation modelling of labour market change, population change, and mobility in Sweden. Thus, the analysis provided in this chapter is conducted within the framework of this project, and its focus is on a 10-year period from 1991 to 2000 (*Statistics Sweden*, 1991–2000). At the beginning of the 1990s, Sweden was hit by an economic recession, implying a considerable loss of employment all over the country. Since then, Swedish institutions have been involved in restructuring the economy and looking for new areas of employment. In this context, tourism featured as a possible area. Hence, the period covers a time when tourism development has clearly been on the public agenda.

The database was created by combining a number of statistical registers on demography, mobility and labour market provided by *Statistics Sweden*. For the analysis, variables indicating age, place of living and occupation were used. The geo-references in the database annually refer to two 100 m x 100 m squares for each individual, one representing the place of residence and the other the place of work. This allows for aggregating data for every geographical unit selected. In this case, the relevant area was defined as the parish Tärna.

Departing from the database, certain selections were made aiming at illustrating current pop-

ulation patterns, the composition of the local labour market and the composition of in-migration to the area. A core problem in all studies focusing on the tourism labour market is its definition (Smith, 1998). In this study, tourism has been defined from a supply-side perspective. For that purpose, the Swedish SNI-codes (Swedish Standard Industrial Classification) were used to delimit the tourism industry. These codes are the most-detailed classification of economic activities available in Swedish statistics. In the database, each individual is related to a code. In the same way, each individual is annually also related to a work-place that is related to an SNI-code, allowing for a rather detailed assessment of the tourist industry. However, as discussed elsewhere (e.g. Leiper, 1990; Smith, 1991), most companies are not entirely devoted to tourism. Customers are usually recruited from both tourists and locals. Hence, it is important to estimate the share of the industries' turnovers that is related to tourism. *Statistics Sweden* provides figures regarding these shares based on interviews and registers, which are used to design the annual tourism satellite accounts estimating the economic value of the tourism industry (Swedish Tourist Authority, 2004). These estimates are available as a national average only (Table 17.1). However, here these are used to assess the local labour market patterns, simply because of the lack of alternate estimates, which probably implies an underrating of the importance

Table 17.1. A supply-side definition of the Swedish tourism industry (Swedish Tourist Authority, 2004).

SNI-code	Branch	Share of tourism (%) for total value added
55	Hotel and restaurant	48
60.1	Railroad transportation	15
60.21–23	Other land transportation	17
61	Shipping	6
62	Aviation	92
63.3	Travel agencies	100
70.2	Services for houses	8
92	Culture, recreation, sports	14
50–52	Retail trade	5
7100	Leasing	10
74.8	Other services	1

of tourism for the labour market. Considering the fact that the Tärna Mountains are a major tourism destination, they should represent an area with an above-average importance. Furthermore, the occupations were all registered in the same way. Accordingly, each individual was related to one occupation. Hence, part-time or seasonal jobs were treated in the same way as full-time employment.

Additional sources such as the national accommodation statistics administered by *Statistics Sweden* are used to provide the touristic context for the destination.

Population and Tourism Development in Tärna

The Tärna Mountains are part of the northern Fennoscandian mountain range only some kilometres south of the Arctic Circle. Thus, the environment can be characterized as alpine and

partly Arctic with long winters and loads of snow (Nordregio, 2004). The elevation of the range reaches beyond 1500 m while the valleys are at about 400 to 500 m above sea level. The Tärna parish, including the majority of the Tärna Mountains, is part of the municipality of Storuman in the County of Västerbotten, Sweden (Fig. 17.1). The municipality is likely to be one of Sweden's most peripheral in terms of access, although a recently opened airport with regular connections to Sweden's capital Stockholm has considerably improved the accessibility.

Tourism started in the 1920s when the *Swedish Touring Club* (STF) opened its first hostel in Tärnaby, the centre of the parish (Arell, 2000). Consecutively, alpine skiing was introduced and created further development of tourism. Additionally, the development of hydropower in the area entailed a rather well-developed road infrastructure and, in terms of investments and compensation, also meant a great deal to the

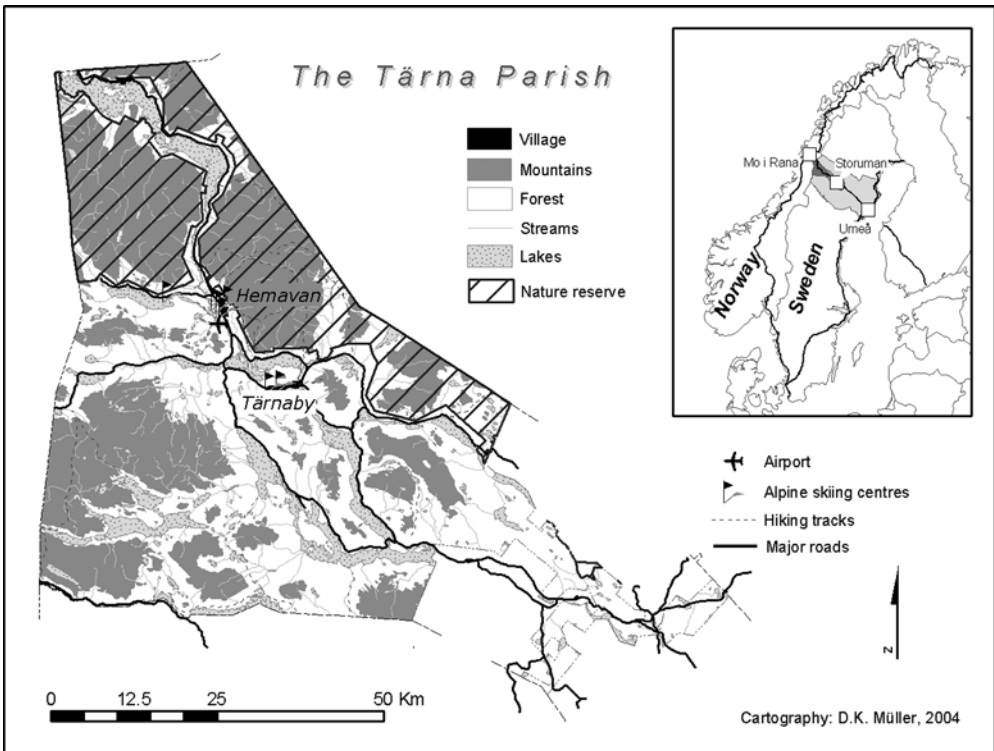


Fig. 17.1. The Tärna parish, Sweden.

mountain villages (Arell, 2000). Hence, tourism development was not necessarily locally induced, but a result of external impetus, which was also the case for other areas of the mountain range (Nilsson, 2000).

During the 1970s and 1980s, the success of the Alpine skier, Ingemar Stenmark, who grew up in the area, put the Tärna Mountains into focus and made it a serious alternative for Alpine skiing in Sweden. Accordingly, since the 1980s, there has been an overall increase in mountain tourism in Sweden, mainly related to Alpine skiing (Fredman and Heberlein, 2001; Fredman *et al.*, 2001). There are three explanations for this growth, i.e. changes in the Swedish society allowing for short trips, media influences focusing on outdoor experiences and Swedish achievements in competitive winter sports. The changes also comprise the spatial distribution of tourism. At the end of the 20th century, the growing popularity of Alpine skiing meant that tourism development was concentrated further south, leaving the Tärna area in a secondary position (Fredman *et al.*, 2001). Nowadays, Tärna's hopes are based on two factors. First *Strömman*, a major company in Swedish tourism, took over the most important tourism-related facilities. This caused some turbulence in the local community but it is also seen as an opportunity to rejuvenate tourism in the area (Arell, 2002). Second, 20 years after the Stenmark-era, Anja Pärson, a new Alpine skiing star, has created a growing interest in the Tärna Mountains.

Despite tourism development, the Storuman municipality was as severely hit by restructuring and population decrease as most of the surrounding municipalities (Pettersson, 2002). Even tourism in the area was not excluded from the decline (Fig. 17.2). However, it should be noted that the figures available cover the entire municipality, but not second-home tourism, which probably accounts for the majority of guest nights in the area (Jansson and Müller, 2003).

Nevertheless, a look beyond the municipal figures discloses that the mountainous parts of the municipality had a stable population development during 1985–1995 (Pettersson, 2002). In contrast, the population in the parish dropped from 1797 to 1645 between 1991 and 2000. Particularly, since 1997, a strong decrease by 100 individuals altogether has been recorded. However, the gender patterns in the municipality were not affected at all. In contrast, the average age of the population increased. Between 1991 and 2000, the share of the population aged below 19 dropped from 21.3% to 19.6%, and the population between 19 and 65 from 48.2% to 44.6%. Accordingly, the number of retirees increased from 30.5% to 35.8%.

In addition to the population registered in the parish, an unknown number of seasonal workers and second-home owners reside in the parish. Müller and Hall (2003) estimate that a population figure accounting for second-home

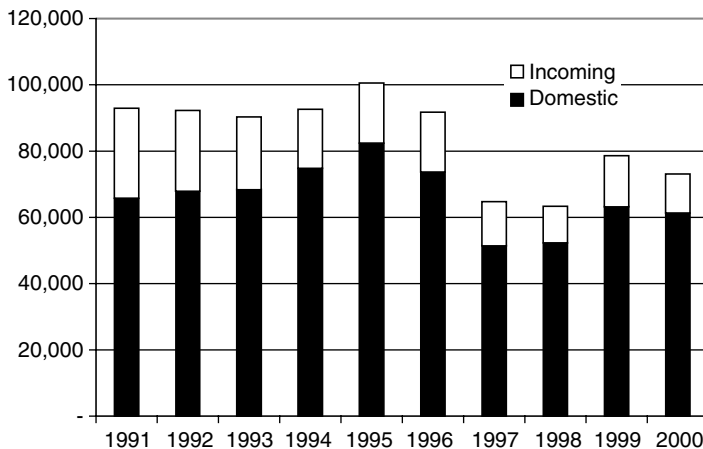


Fig. 17.2. Guest nights in hotels, hostels and camping grounds in the Storuman municipality, 1991–2000 (Statistics Sweden).

owners and distributed over the entire year would be about 12% higher than the recorded figure, thereby implying an additional consumption in the area corresponding to the equivalent of more than 86 Swedish average households (Jansson and Müller, 2003).

The Tourism Labour Market

During the research period, the employment figures decreased in the Tärna parish. At the beginning of the period, 1029 people reported some kind of employment. In 2000, the number had decreased to 888. Thus, the share of the population in employment fell moderately from 57% to 53%, nevertheless indicating a problematic trend.

However, the share of tourism-induced labour increased from 7.4% to at least 9.0%. In fact, tourism employment reached its peak in 1997 with 9.7%. Then, the figures follow the decline in the accommodation statistics, to finally recover in 2000. The majority of the tourism-induced labour can be found in the hotel and restaurant sector, which constitutes more than 50% (Table 17.2). Moreover, the number of jobs created in the tour operator sector increased to 20 in 2000. This increase correlates with a decline in the cultural sector, comprising initially, for instance, of indigenous Sami tour operators, indicating that the changes might be due to changing coding procedures.

In fact, considering the size of the local community, it can be argued that the figures presented in Table 17.1 underrate the factual scope of tourism-related employment owing to the national estimates used for the calculations. The presented figures are thus to be considered as extremely conservative estimates, which is another reason why it is obvious that tourism is a vital sector for the local business community. Nevertheless, there was only a marginal change in the number of businesses focusing on tourism.

In-migration to Tärna

Altogether, 480 individuals moved into the Tärna parish between 1991 and 2000. The annual number is rather stable, varying between 42 and 62 people. Most of the in-migrants – 307

individuals – were aged between 19 and 65 years when entering the parish. Moreover, the number of youngsters (118) is fairly high, indicating that in-migration to a considerable extent consists of families with children. In contrast, only 55 senior citizens entered the area during the research period.

A considerable share of the in-migrants have some previous relation to Tärna. In fact, 97 of the in-migrants, corresponding to more than 25% of the adult in-migrants, were born in the parish. In addition, 29 in-migrant households already owned a second home in the area in 1991, but not all of these were born in Tärna.

A majority of the in-migrants (253) moved into the parish from Västerbotten county, and in fact, a considerable number came from neighbouring municipalities (Fig. 17.3). Altogether, 71 individuals in-migrated from other parts of Storuman municipality. Moreover, 139 individuals moved in from southern Sweden, 39 of which previously resided in the Stockholm–Uppsala area in the east of central Sweden. Hence, the figures indicate that Tärna attracted in-migrants from all parts of Sweden, among these many households with children. In fact, of the 1646 inhabitants living in Tärna in the year 2000, only 700 lived in the area during the entire research period, thereby making it heavily dependent on in-migration.

Tourism Involvement

Since 1992, 179 people altogether had in-migrated to Tärna and then taken some kind of job related to tourism. This corresponds to 37% of the total in-migration to the area. In 2000, about 280 individuals had tourism-related occupations and although not all in-migrants remained in the tourism sector, it is obvious that these new inhabitants play an important role in the tourism-related labour market. In 2000, the number of in-migrants still working within tourism-related businesses amounted to 101 or 36% of the total population involved in tourism-related work. There is no obvious gender dimension regarding the involvement in the tourism-related labour market. The number of men and women in tourism is almost the same.

The in-migrants in the tourism-related labour market had less obvious links to the area.

Table 17.2. Tourism labour market composition in Tärna, 1991–2000, measured as job equivalents according to the estimates used in the Swedish TSA.

Sector	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Hotel and restaurant	53.6	57.3	53.6	54.1	60.6	66.3	49.8	40.9	46.1	48.9
Railroad transportation	0.0	0.2	0.0	0.2	0.2	0.2	0.2	0.0	0.0	0.0
Other land transportation	2.3	4.3	2.9	4.1	4.5	4.1	3.6	1.4	1.1	1.3
Shipping	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Aviation	2.7	1.8	2.7	2.7	3.6	2.7	2.7	1.8	2.7	2.7
Travel agencies, operators	3.0	0.0	1.0	0.0	0.0	3.0	0.0	11.0	12.0	20.0
Services for houses	0.6	2.1	0.7	0.6	2.4	1.9	1.2	2.2	1.8	1.6
Culture, recreation, sports	9.1	9.0	9.0	9.7	8.7	8.5	9.1	8.3	10.1	0.0
Retail trade	4.7	4.3	4.0	3.7	3.8	3.8	4.2	5.4	4.4	5.3
Leasing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other services	0.0	0.0	0.1	0.0	0.0	0.0	0.4	0.3	0.2	0.2
<i>Sum</i>	<i>76.1</i>	<i>79.1</i>	<i>74.0</i>	<i>75.1</i>	<i>83.9</i>	<i>90.7</i>	<i>71.3</i>	<i>71.5</i>	<i>78.4</i>	<i>80.0</i>
Share of tourism (%)	7.4	7.7	7.5	7.9	8.8	9.7	7.5	7.7	8.7	9.0

Only 16% were born in and about 3% had owned a second home in Tärna, while these figures for the entire group of immigrants were 20 and 6%, respectively. All in-migrants were aged below 65 and, indeed, many were below 19 when entering the area. The educational level of these in-migrants was also low. There was only one person among the in-migrants who had studied at least 3 years at the university level. Furthermore, 19 in-migrants had some kind of post-high-school education. The largest group (114) had completed Swedish high school (grades 10 to 12), while 35 had only completed compulsory school (grades 1 to 9). This low average educational level at least partly indicates the young age of many migrants.

In-migrants who became involved in the tourism-related labour market are to a large extent from other parts of the municipality and the neighbouring municipality in the south (see Fig. 17.3). Additionally, a large number of in-migrants working in the tourism sector came

from Lycksele, the interior centre of Västerbotten County, and Umeå, Västerbotten's capital, located at the coast. Almost all migrants from these municipalities were involved in tourism. Individuals later involved in tourism in Tärna dominate, even as regards in-migration from urban areas in southern Sweden.

Not all in-migrants worked in tourism during the entire period (Table 17.3). Instead, tourism-related work formed an initial occupation or an occupation taken a year or two after some years in the parish with unemployment or work in the primary sector of the economy. Overall, it is obvious that the mountain parish did not offer too many long-term occupations. Many in-migrants changed occupations fairly often.

Only 62 in-migrants involved in tourism businesses in Tärna held a tourism-related occupation prior to their in-migration (Table 17.4). The majority of these were working in the hotel and restaurant sector, which also provided employment for 49 people from other sectors of the economy or those previously unemployed. Particularly, the latter and people working in health care took jobs within the hotel and restaurant sector. A fairly large number of in-migrants (46) were employed in Tärna's retail trade. However, according to the estimates provided in the Swedish Tourism Satellite Account (TSA) (Table 17.4), this only represents 2.3 tourism-induced jobs. As previously mentioned, this appears to be an underrating. Even the sectors for recreation and tour operations provided employment opportunities for a number of in-migrants.

The in-migrants delivered work equivalent to about 48 jobs. However, as previously mentioned, not all of them remained in tourism. In 2000, 101 in-migrants or about 57% of all in-migrants who had worked at least a year in tourism remained in this sector. Accordingly, the initial 48 job equivalents should correspond to about 27 job equivalents in 2000, which means that about a third of all tourism-related employment in Tärna is occupied by in-migrants.

Conclusions

Tourism development is often considered as a means of balancing economic decline and depopulation in rural areas. This argument usually justifies enormous investments in various tourism

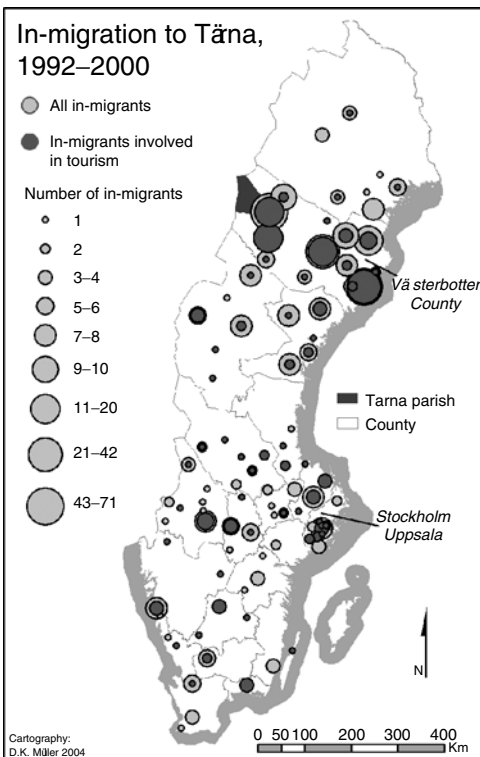


Fig. 17.3. In-migrants to Tärna, Sweden.

Table 17.3. Changing tourism involvement among in-migrants, 1992–2000.

Years	In-migrants								
	1992	1993	1994	1995	1996	1997	1998	1999	2000
1992	13								
1993	14	8							
1994	11	11	9						
1995	11	12	12	5					
1996	14	12	12	9	11				
1997	14	9	13	6	10	14			
1998	11	10	9	9	13	13	20		
1999	8	11	9	12	10	12	19	10	
2000	9	10	7	7	14	12	15	11	16
Total number	22	22	18	18	22	21	26	14	16

Table 17.4. Employment changes into tourism among in-migrants to Tärna, 1992–2000.

Previous occupation outside Tärna	Tourism occupation in Tärna									Sum
	Hotel and restaurant	Railroad transportation	Other land transportation	Aviation	Travel agency, tour operators	Services for houses	Culture, recreation, sports	Retail trade	Other services	
No occupation	13		1		2	1	4	8	4	33
Hotel and restaurant	25				1	1	4	4	1	36
Railroad transportation		1								1
Other land transportation			1							1
Aviation				1						1
Culture, recreation, sports					1		2			3
Retail trade	6		1				3	8	2	20
Agriculture and forestry	1					1			1	3
Manufacturing	3		1					7		11
Electricity	2							2		4
Construction	2					1		5		8
Transportation, communication			1		1	1		1	2	6
Business services	3		1					2	5	11
Administration	1							2		3
Education	5						1	3	1	10
Health care	13				1	1	4	4		23
Sum	74	1	6	1	6	6	18	46	16	174
Job equivalents	35	0.2	1.1	0.9	6.0	0.5	2.5	2.3	0.2	48.4

projects, for example in the context of EU-development programmes. This study showed that tourism development indeed contributes to creating or maintaining jobs. However, the results of

the study indicate that tourism-related employment is, to a considerable extent, chosen by in-migrants. Hence, tourism forms an important precondition for in-migration in that it provides

service jobs with relatively low entrance barriers (Riley *et al.*, 2001). In the study, more than 100 in-migrants changed employment into tourism.

A critical aspect of the paper is the supply-side approach employed to estimate the impact of tourism. As mentioned earlier, this approach is expected to underrate the factual extent of tourism-induced labour. Hence, the presented figures represent very conservative estimates.

Many in-migrants do not necessarily take up employment in tourism directly after their arrival. After a year or so in the destination area, tourism offers a first job, which is sometimes left the following year. Hence, tourism does not lure the majority of in-migrants to the area. In fact, a quarter of all in-migrants were return migrants born in the parish. About the same share, but not in all cases the same individuals, did own a second home in the area previous to arrival. It was not predominantly the members of these groups who accepted employment in tourism-related businesses. Instead, the figures indicate that members of younger households, often from the neighbouring municipalities or from urban centres within the county and the south of Sweden, took these jobs.

Hence, in-migration to Tärna cannot be characterized as gentrification either. Successful middle-aged men and women changing a profes-

sional career in the urban centres for an alternate lifestyle in the mountains do not constitute the group of in-migrants, at least not formally. Young age, low incomes, limited education and frequent employment changes instead point at another group with different motives. The uncertain situation on the local labour market indicates that production-led motives are not the main reason for migrating to the mountain area. This is particularly true for those in-migrants involved in tourism-related work. Instead, the rather young group of in-migrants hints at the presence of more consumption-led motives. Hence, the amenities of the mountain region inviting a variety of outdoor activities seem to be an important reason for relocating the place of residence into the periphery, at least temporarily. Environmental and social reasons may also play an important role; the mountains are simply a good place for raising children.

The extent to which the young in-migrants will also remain in the parish was not covered by this study. However, as long as they are flexible towards taking up various occupations, they should have an appropriate prerequisite for making a living in Tärna, even in the future. And a strong tourism sector is likely to contribute to creating the necessary circumstances.

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Part IV

Amenity Migrants in Asia and the Pacific

Amenity migrants can be found in many places in Asia and the Pacific; however, knowledge about them and their impacts is still almost non-existent. It is a very diverse area, and includes some of the economically poorest and culturally richest places in the world. The three chapters about the Philippines, Australia and New Zealand constitute an important beginning to understanding the phenomenon in this area.

In Chapter 18, Romella Glorioso synthesizes and extends her three previous studies of amenity migration in the Baguio bioregion of central Luzon Island, the Philippines. She details the historical evolution of amenity migration and its impacts on the region's unique environment and culture. The author focuses on an innovative approach to public planning and decision making: multiple-scenario strategic analysis in bioregional context. In addition to an understanding about the Baguio condition, the result is a systemically integrated set of recommendations for rehabilitating and maintaining a severely degraded environment and improving the welfare of Baguio's disadvantaged, relying principally on learning and spiritually motivated amenity migrants.

The research of Ralf Buckley, Nikola Sanders, Claudia Ollenburg and Jan Warnken in Chapter 19 examines various direct and indirect sources of evidence for amenity migration to mountain and other inland areas of Australia. Using the national census for the first time for this purpose, they find statistically significant evidence of amenity migration and relate this to land and property values, property marketing materials and data on rural residents operating tourism businesses on agricultural holdings and second-home owners. All the data sources, though individually imperfect, indicate similar patterns, which coincide broadly with personal observations and anecdotal evidence of increasing amenity migration over recent decades.

In Chapter 20, Michael Hall examines amenity migration in Central Otago, within the southern alpine area of New Zealand's South Island. Emphasis is placed on the roles of second homes and tourism as major factors in amenity migration. Key considerations include the demands being placed on local resources, access issues and potential conflicts between amenity migration and other land uses. In conclusion, the author stresses the importance of adapting growth management strategies that consider wider aspects of human mobility than they currently do, as well as the need for improved statistical and research regimes that can capture the dynamics of the amenity migrants.

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18 A Bioregion in Jeopardy: the Strategic Challenge of Amenity Migration in Baguio, The Philippines

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A Vision Neglected

The placing of formal architectural silhouettes upon the summits of the surrounding hills would make a hard sky-line and go far toward destroying the charm of this beautiful landscape. On the other hand, to place buildings on the sloping hill-sides where they would be seen against a solid background of green foliage is to give them the best possible setting without mutilating their surroundings. The preservation of the existing woods and other plantings should be minutely looked after, not only the eminences immediately contiguous to Baguio proper, but also to the surrounding mountains; and the carrying out of these precautions should be one of the first steps in the development of the proposed town. Unless protective measures are taken the discredited intuitive of energetic lumbermen will soon cause the destruction of this beautiful scenery.

(Daniel Burnham, early 1900s, cited in Reed, 1976: 127).

Introduction

Lying within the Philippine Cordillera of Luzon Island is the Baguio bioregion, a mountainous landlocked area of some 7000 km², with peaks rising to 2922 m above sea level and about 82% of its territory publicly owned. It is composed of

the provinces of Benguet, Ifugao and Mountain Province, and is also under the jurisdiction of the Cordillera Administrative Region (CAR), created in 1988 to promote and protect the traditional cultures of northern Luzon's indigenous peoples. The bioregion's social and political-economic hub is 1500-m-high Baguio City, home of almost half the bioregion's total population, some 400,000 inhabitants (Fig. 18.1).

Since the early 1900s, the bioregion has been a premier amenity-seekers' destination in the Philippines due to its salubrious climate, forested mountains of natural and cultural landscapes and indigenous as well as lately, post-industrial cultures. This is an exceptional combination of characteristics difficult to find in the Philippines, if not more globally. It has also recently become an educational centre rivalling Manila, the national capital, and the host to two significant high-technology manufacturers. These attributes, and the fact that the bioregion's centre is a locus of socio-economic, political and artistic Filipino elite, attracts a multitude of poor economic migrants, who typically illegally occupy already overused and misused watersheds and other open spaces. All this human focus on a fragile mountain ecology has resulted in critical deforestation, watershed pollution, flooding and drought, so that in 1988, the Philippine Department of Environment and

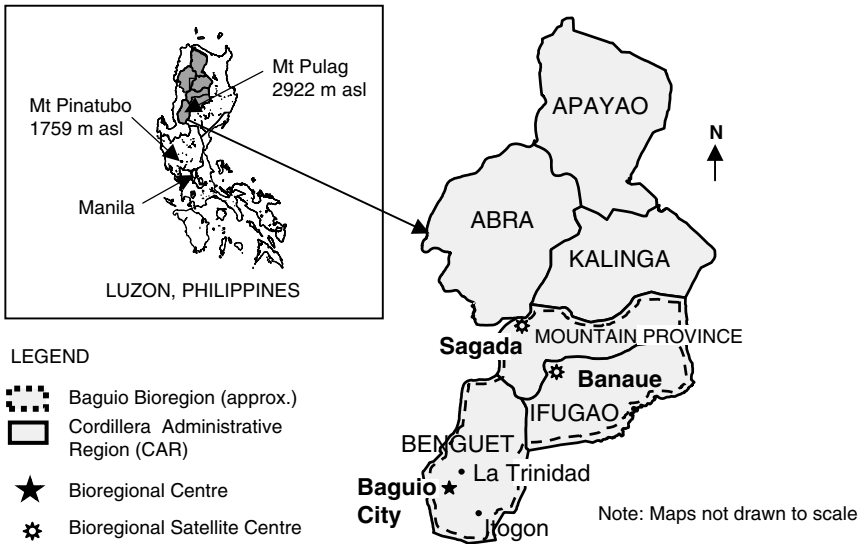


Fig. 18.1. The Baguio bioregion in the Cordillera Administrative Region. Cartography: A.B. Pinga and R.S. Glorioso (2005).

Natural Resources (DENR) declared Baguio an 'environmentally critical area'. In 1990, a severe earthquake hit Luzon with its epicentre near Baguio. Hundreds died, a fourth of its housing stock was destroyed and multiple-storey buildings collapsed, and for many months the main access, Kennon Road, was closed by major landslides. Real property values plummeted as the Philippine Institute of Science and Volcanology discovered a major active fault near Baguio, which, combined with elevation, makes earthquakes more devastating. Tourism also dramatically declined, and most mining companies in the bioregion ceased operations, which increased to tens of thousands the jobless. In the following year, 25 km from Baguio the supposedly extinct volcano, Mount Pinatubo (Fig. 18.1), experienced the third largest global eruption of the last century. This resulted in the US military abandoning nearby bases including Camp John Hay, their principal South-east Asian recreation centre.

Key stakeholders in Baguio realized that they needed to act swiftly if the small window of opportunity they saw within this tragic condition was to be realized. The population of Baguio, placed at 300,000 before the earthquake, decreased to half in 1990. This suggested a kind of respite for this urbanizing mountain ecosystem,

especially its centre's physical infrastructure, which was built to support only 25,000 people. Among other actions, in late 1992 a mission was undertaken by the Mayor and other civic leaders of Baguio to the Asian Institute of Technology (AIT) in Bangkok, to investigate what might be done to rehabilitate their degraded environment and shattered economy. Realizing tourism *per se* was not the answer, they wanted to redirect their future to a more resource-conserving and reliable economic base, one that would also foster socio-economic and political equity. The innovative amenity migration (AM) construct was introduced to this group as a possible alternative to, or larger context for, tourism. First, Baguio seems to have similar characteristics with the Santa Fe bioregion in the USA, a place where economic success was based partly on AM (Moss, 1986, 1994, 2004; Glorioso and Moss, Chapter 5, this volume); and second, AM potentially offers greater opportunities than tourism. Therefore, in January 1993, a strategic analysis of AM began in collaboration with the Baguio Mayor and City Council, key Baguio environmental NGOs and other local concerned individuals. It was probably the first study of this phenomenon in so-called 'developing countries'. The analysis was completed in August 1993, the report taking the form of a Master of

Science thesis: *Key policy implications for strategic use of amenity resources: a study of longer-term amenity migration, Baguio Bioregion, the Philippines* (Dimaculangan, 1993). Several years later the study was extended as part of my doctoral dissertation: *The role of amenity migration in amenity landscape conservation strategy: with implications for mountain tourism and ecological integrity in an information society, the cases of Baguio bioregion, Philippines and Sumava bioregion, Czech Republic* (Glorioso, 2001).

Both studies used an innovative bioregional ecosystemic approach (BRES) (Moss *et al.*, 1999). It consists of three analytical and planning constructs and techniques that are suitable for studying complex and rapidly changing systems: (i) multiple scenarios strategic analysis and planning (Mandel, 1983; Schoemacker, 1993; Ringland, 1998, 2002; Moss *et al.*, 1999; Ewert *et al.*, 2005); (ii) key stakeholders analysis (MacMillan and Jones, 1986; Nutt and Backoff, 1992; Glorioso and Moss, 1994); and (iii) local sustainable development indicators (LSDI) (Atkisson, 1998; Chambers *et al.*, 2001). Information was developed from: (i) in-depth, semi-structured interviews, conducted in 1993 and 1999 with bioregional and national key informants; (ii) participant observation through my involvement in land use and environmental planning in the Baguio bioregion and more nationally between 1986 and 1995; (iii) analysis of documentary materials; and (iv) content analysis of other materials, such as telephone directories, promotional literature and photographs (Dimaculangan,

1993; Glorioso, 2001). Then in January 2004, these analyses were updated with further fieldwork, focusing on the condition of the bioregion's amenity attributes, testing specifics of the amenity migration construct (Moss, 1986, 1994, 2004; Price *et al.*, 1997) and relevant public policies.

An Era of Muddling Through

More than a decade has passed since AM was first identified and studied in the Baguio bioregion and yet little has been done to take advantage of the positive aspects of this phenomenon; or manage its negative ones. The bioregion's socio-economic public policies and actions remain vague and still revolve around tourism. The result is, by and large, the same or worse conditions. This is most evident in: (i) reconstruction of Baguio and roads in and to the bioregion with the previous template; (ii) doubling of squatters on the denuded watersheds of Baguio and its surroundings without water and sewerage support systems (Fig. 18.2); (iii) increased solid waste and associated groundwater leaching; (iv) increased traffic congestion; (v) increased numbers of non-earthquake resistant multiple-storey hotels; (vi) the rationing of water to residents while tourists accommodations enjoy 24 h supply; (vii) closing again of Camp John Hay to low- and middle-income residents and tourists, while improving amenities for a small elite

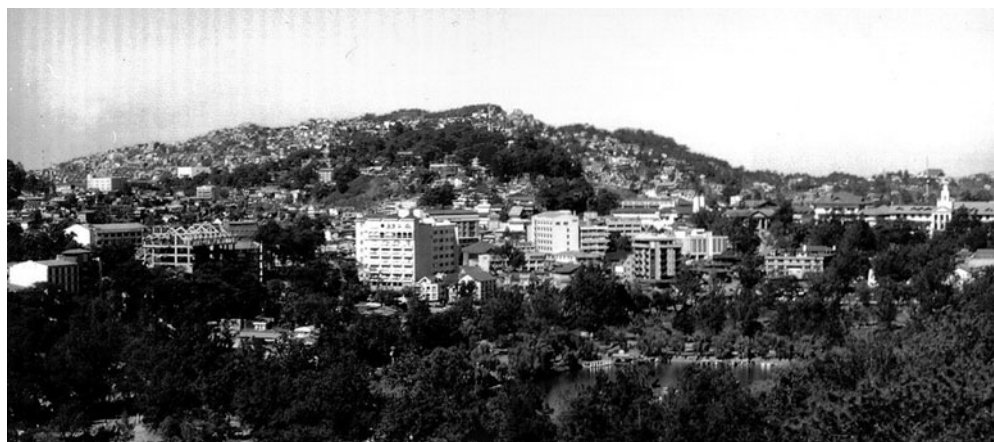


Fig. 18.2. Central Baguio City with Burnham Park in the foreground and watershed squatting above in background (photograph: R.S. Glorioso, January 2004).

(especially upgrading of golf course and establishment of a casino) and destroying most historic buildings; and (viii) the tripling of the City's population during the annual peak tourist season (April–July).

Perhaps most significant for this discussion, and for all the above factors, is the reliance of the bioregion's public officials (particularly municipal mayors and councillors, provincial governor, department heads and planners) on virtually uncontrolled tourism for economic benefit. Although many know this dependency is not working well, in that the bioregion's amenities and the quality of life of most of its inhabitants are being severely degraded, they do not develop an appropriate strategy. This appears to mainly stem from these public officials not wanting to or being afraid to deviate at all from commonly accepted economic mechanisms, here principally tourism, to a more strategic, innovative and relatively untested tool – guided AM (see especially Chipeniuk, Chapter 11; Moss, Chapter 21, this volume). This became quite clear in about 2000. Such behaviour seems typical of Baguio, and Filipino public officials more generally, as they lack relevant management skills, are not informed risk takers and in particular will not risk negative special interests and public opinion. Therefore, they tend to be reactive, favouring the *status quo*, use an incremental, muddling through approach to problem solving and focus on the short term (Rood, 1993; Rood and Casambre, 1994). These public officials' characteristics may be globally common (Christensen, 1998).

This chapter is a synthesis and further consideration of my three previous Baguio AM studies (1993, 2001, 2004). After describing the AM phenomenon in the Baguio bioregion, it offers two means for improving its condition. The first is more innovative and consists of using: (i) the AM construct for understanding of key public policy issues; (ii) public multiple scenarios strategic analysis and planning; and (iii) a bioregional approach to public-sector decision making. The second means identifies better public policies to control this special place's growth and development. It describes how to manipulate the opportunities that AM offers by: (i) understanding well the phenomenon in this bioregion; (ii) identifying the key policy issues for rehabilitating and maintaining the bioregion's amenity attributes; and

then (iii) formulating a strategic framework to help rehabilitate and maintain these attributes. While these propositions do not solve a complex problem, they appear to offer insight, and strategic action, which should assist the Baguio bioregion to turn its existing AM problem into an opportunity.

The Baguio Amenity Migrants

Proto-amenity migrants

It is customary in tropical countries to develop and maintain at some favourable point at high altitude a resort for health and recreation purposes to which residents can go a period of each year...

It is almost certain that as the facilities and attractions of Baguio increase, its use will become more and more general and widespread; many residents of the Philippines will make it their resort for the whole year; many more will come for the regular season, and others will come up from time to time as they feel the need of a change from the tropical climate below (W. Cameron Forbes, early 1900s, cited in Reed, 1976: xxi).

W. Cameron Forbes, the first US colonial Governor General of Baguio (1904–1913), envisioned it as one of the finest hill station in Asia, and may have been the most important key stakeholder in the historical development of AM in this bioregion. He hired Daniel H. Burnham, a leading town planner of the time, to conceptualize the town's physical form and promote the establishment of Camp John Hay, the US military's premier Southeast Asian leisure facility. Forbes' efforts bore fruit when between 1906 and 1909, some 300 large lots were sold in Baguio, most to western and Filipino elite. And later, in the 1920s, Baguio was widely acclaimed as one of the foremost hill stations in tropical Asia with thousands of summer homes owned by wealthy proto-amenity migrants (defined below), American and Filipino elite.

Available information indicates that the majority of these early proto-amenity migrants (PAM) were citizens of the USA: military personnel or associated civilians (Gleeck, 1974; Reed, 1976; Crossette, 1998). While they appeared to be primarily attracted by the healthy cool mountain air, their Filipino counterparts seemed motivated by socio-economic

peer approval, and secondarily by the climate. Other motivations for both were the beautiful pine-forested landscapes, spiritual conduciveness of the highlands, leisure and the abundance of fresh temperate vegetables and fruits. And for the Americans, a lower cost of living with similar comfort level to the USA.

This proto-amenity migration continued, but with marked change in its characteristics. From the early 1950s to the late 1960s, peer approval as the primary motivating factor for Filipinos was replaced by environmental attributes, especially the cool climate. It is unclear whether the numbers of foreign PAMs still exceeded the Filipinos in this period; however, the latter increased and played key roles in the economic growth of Baguio. Many were entrepreneurs in tourism-related activities, such as restaurants, accommodation and the real estate business, while others pioneered the learning industry as Baguio became the northern Philippines' centre of education.

During approximately the martial law years in the Philippines (1972–1986), environmental degradation in the highly accessible and politically stable areas of the bioregion (principally the towns of Baguio, La Trinidad, Itogon and Banaue) (Fig. 18.1) intensified. Parallel, low and inappropriately skilled resource management typified governmental stewardship. Forests were cut for mine construction, agro-business and export; watersheds were opened for human habitation; building codes typically ignored; and also human rights violated. While there was a significant increase in Filipino proto-amenity migrants from the early 1970s to the late 1980s, the number of foreign PAMs in the bioregion started to decrease. Contributing factors were the degrading landscape and fear for personal safety, as some foreigners were being kidnapped outside the bioregion's core. However, at the same time, Baguio started to attract significantly more foreign university students, especially from Thailand, Korea, Nepal and Taiwan, to study mainly medicine and agriculture.

The shift to amenity migration

This research generally follows Moss' (1986, 1994, 2004) construct of AM, that within the

context of the 'new economy' (Castells, 1999; Gilpin and Gilpin, 2002; Levitt, 2002; Alcalá, 2003), migration for amenity has emerged as a significant societal change agent, especially in mountain regions. In this migration pattern, six key factors synthesize into two contemporary societal driving forces: (i) increasing motivation for AM (made up of higher valuing of the natural environment, cultural differentiation and leisure, learning and spiritualism); and (ii) greater facilitation of mobility (consisting of increasing discretionary time, discretionary wealth and access through contemporary communications and information technology) (Moss, 1986, 1994, 2004). I call migration for amenity without this IC-based new economy, proto-amenity migration.

As is pointed out in my earlier research (Dimaculangan, 1993; Glorioso, 2001), the relationship between leisure, learning and spiritualism and the other motivators needs further analysis, particularly because it may be key to addressing the issue of what kinds or combinations of amenity migrants a bioregion should attract in order to sustain and improve its amenities and, more generally, quality of life, and maintain local control over its resources, specifically land and water, and associated landscape aesthetics.

Aldo Leopold (1949), one of the foremost conservationists of the 20th century, offers insight into understanding this leisure, learning and spiritualism nexus. He suggested four components of recreation: (i) trophy-hunting – the mass use of physical objects pursued as trophies – a certificate which attests that its owner has been somewhere and done something; that he has exercised skill, persistence or discrimination in the age-old feat of overcoming, outwitting or reducing-to-possession; (ii) feeling of isolation in nature; (iii) perception of natural processes, which means a recreationist's reaction towards the outdoors does not depend only on what the recreationist saw, but on the quality of the mental eye with which it was seen. A person of perception does not only see the surface of things, but understands the origins, functions and mechanisms of what was seen; and (iv) a sense of husbandry, which is realized only when some art of management is applied by some person of perception.

Leopold further suggested that the above components of recreation are an evolutionary process.

The trophy-hunter is the prerogative of youth, racial, or individual, and nothing to apologize for. The disquieting thing in the modern picture is the trophy-hunter who never grows-up, in whom the capacity for isolation, perception, and husbandry is under-developed, or perhaps lost. He is the motorized ant who swarms the continents before learning to see his own backyard, who consumes but never creates outdoor satisfactions. To enjoy (nature), a hunter-recreationist must possess, invade and appropriate. Hence, the wilderness that he cannot personally see has no value to him. Hence, the universal assumption that an unused hinterland is rendering no service to him (1949: 176).

Moss' 'leisure' embraces Leopold's 'trophy-hunting' and the 'feeling for isolation in nature', while 'learning' includes the 'perception of the natural processes'. However, learning in the context of this research has a deeper meaning. It not only pertains to the perception of the origins, functions and mechanisms of what one sees, but the perception of *Gestalts* or a web of relationships. A learned or knowledgeable human being sees that there are no isolated objects, but that objects are nodes in a vast web of relationships; that humans are but one strand in that web. And when a human being learns to identify with nature, that his or her physical self and the nature are one and the same, and feel deeply that when one destroys other strands in the web of life, one is destroying her or himself, this human being has attained spiritualism, which is also referred to in some literature as the 'ecological self' (Naess, 1985; Devall, 1988; Matthews, 1994; Capra, 1996; Harding, 1998). From this oneness there arises a deep appreciation of the reality of interdependence and interconnectedness; full awareness that every interconnected aspect of it has its own intrinsic value, irrespective of its usefulness to human beings, and therefore has the right to its continued existence. Leopold refers to this as 'biotic right'. A person who is highly spiritual converts his beliefs or feelings into decisions, lifestyle and action, which Leopold interprets as a person having 'sense of husbandry'. While Leopold and Naess describe this as an evolutionary process, Capra, Devall and Harding's writings suggest it need not be.

My research also shows that the stronger the ties of a community to the land, the more amenity migrants find the place conducive to spirituality. Typically, in the Baguio bioregion, these places have also the higher quality natural environment, more intact indigenous culture and less connection to the global economy. Although the bioregion's learning- and leisure-motivated amenity migrants are also attracted to the high quality of natural environment, they are less attracted to Moss' cultural differentiation. In addition, unlike amenity migrants motivated by spiritualism, learning amenity migrants need better access to contemporary IC technologies, proximity to superior libraries, research institutions, colleges and universities that offer opportunities for new information or knowledge and some level of comfort. Leisure amenity migrants expect a much higher level of material comfort and convenience compared to learning amenity migrants (Fig. 18.3).

Moreover, the identification of material comfort as a key factor for learning- and leisure-motivated amenity migrants is where my research results vary from Moss' 1997 model of amenity migration (Price *et al.*, 1997). Callen *et al.*'s (1993) Chiang Mai, Thailand research indicates the same. However, it should be noted that Moss initially recognized the phenomenon in the comparatively economically developed bioregion of Santa Fe (Moss, 1986; Glorioso and Moss, Chapter 5, this volume). So, while my research indicates that the desired level of comfort of learning amenity migrants was high in a Third World setting, perhaps it is similar to the minimum necessary for those in economically developed countries.

Amenity migrants can be classified in three ways: (i) length of stay (permanent, intermittent, seasonal); (ii) attitude towards resource use (resource conservers and consumers); and (iii) based on their motivation (natural attributes, cultural attributes, leisure, learning, spirituality) (Moss, 1986, 1994, 2004; Price *et al.*, 1997; Glorioso, 1999).

The actual AM era in the Baguio bioregion started in the late 1980s, when the following conditions emerged and continued to develop: (i) upgrading of the telecommunications and transportation system, allowing greater access and mobility; (ii) tertiary educational institutions started offering programmes that should facilitate

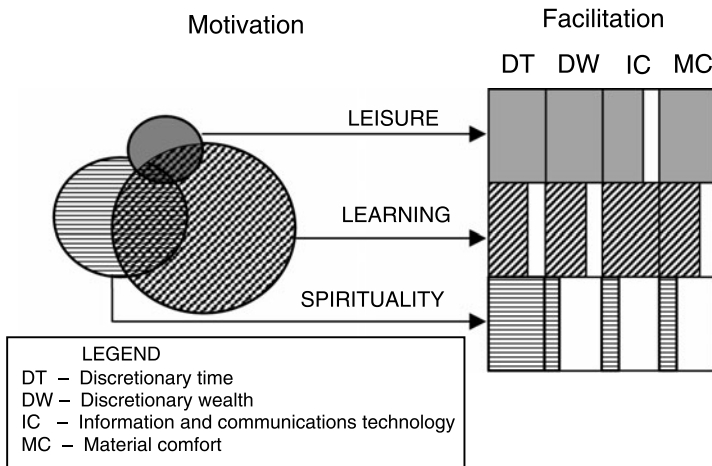


Fig. 18.3. Baguio bioregion amenity migrants: leisure, learning and spirituality motivation and facilitation relationship. Illustration: R.S. Glorioso (2005).

access to the better employment opportunities of the 21st century (health care, engineering, environment and high technology) (Herzenberg *et al.*, 1998; Burton-Jones, 1999; Atkinson, 2002), and attract more students; (iii) attraction of amenity migrants well connected to the global economy and culture; and (iv) location of high-technology manufacturing industries. These may be considered as representing the early influence and representation of a globalizing information age; shifting from mass production capitalism to global knowledge intensive capitalism. In addition, there appears to be a shift to motivational values and behaviour more characteristic of amenity migrants in the USA and Canada (Moss, 1986, 1994, 2004; Jobes, 2000; Stewart, 2002).

The contemporary amenity migrants

According to key informants, the majority of Filipino and foreign amenity migrants in 1993 and 1999 were permanently residing in the bioregion. Almost 100% of amenity migrants in 1993 and 1999 were Filipinos, and as a percentage of the bioregion's total population were about 40% in 1993, and 10% less in 1999. An estimated 90% of all the bioregion's amenity migrants were living in Baguio City in 1993, compared to 80% in 1999. These decreases may be attributable to the continuing degradation of Baguio's natural environment

as discussed above. However, very few appeared to be relocating in the bioregion's principal AM satellite centres, Banaue and Sagada (Fig. 18.1). Although the latter's environmental quality remained high, access and comfort were markedly inferior to that of the Baguio City urban area. These declines may also have been the result of out-migration due to other dissatisfactions or inability to remain (see especially Jobes, 2000).

Along with an increase from a few hundred to some 4000 foreign amenity migrants between 1993 and 1999, a major change occurred in the composition of these in-migrants. In 1999, some 80% were Koreans, 15% were Taiwanese, Chinese and Japanese and 5% were Western Europeans, North Americans and Australians. This compares with 70% North Americans, 20% Western Europeans and 10% Japanese in 1993. Except for the collapse of the economies of the 'Asian Tigers' in 1997, and considerably improved IC infrastructure in the bioregion, factors favouring foreign AM remained the same as in 1993: (i) low cost of living; (ii) English-speaking local population; (iii) favourable government policies toward foreigners (e.g. granting permanent residence visa within 5 working days); (iv) significant tax exemption for foreign companies locating their Asia regional headquarters in the Philippines; (v) Filipino people's accommodating attitude; (vi) comparable universities; (vii) gourmet restaurants (including foreign specialties); and (viii) a wide selection of foreign newspapers

and TV programming. One significant reason identified by key informants for the decline of North American and Western European amenity migrants was the loss of an excellent hospital and reduction of skilled doctors in the bioregion after the American facilities and services were terminated in 1991; 'one now has to go to Manila for a serious illness'. While an issue for North Americans and Western Europeans, East Asian amenity migrants could conveniently return to their countries. This condition may indicate the level of commitment of especially the former foreign amenity migrants who remained in the bioregion. And it was also these foreign residents who were typically involved as volunteers in socio-economic and environmental projects in the bioregion.

With the above came a change in the economic activity of foreign amenity migrants. While the majority in 1993 were retirees, especially the North Americans and Western Europeans, in 1999 the majority were younger, more economically active: students, businessmen involved with IC, language teachers, missionaries and real estate developers. This profile remained in 2004. Although there were still retirees, they were no longer the majority. But caution is suggested here regarding the informants' definition of 'retirees'. As life expectancy extends, 'retirement' is redefined. Elders expect to work after 'retirement' or start new careers, engage in lifetime education and live in places that offer opportunity for new skills and information (AARP, 2002; Taylor, 2002; Moss, Chapter 1; Müller, Chapter 17; Hall, 20, this volume).

The economic activities of domestic and foreign amenity migrants were similar but with the former less involved in IC technology and more in tourism-related businesses (restaurants, galleries, pensions, etc.), corporate management, educational institutions, organic farming and fine arts. However, key informants noted an increase in Filipino amenity migrants' involvement in IC activities between 1999 and 2004.

Both Filipino and foreign amenity migrants appeared to value highly the bioregion's environmental attributes, especially temperate climate, beautiful natural and cultural landscapes, pine forest ecology, and indigenous, living tribal cultures. Although indigenous culture was identified in the 1993 interviews as a key motivating factor, informants in 1999 and 2004 believed that

appreciation of these cultures had increased, along with awareness and understanding of their roles in maintaining the bioregion's ecosystem. This suggests a Leopold-like progression from learning to self-identification or spirituality. These migrants were locating especially in Banaue and Sagada, which with its more intact indigenous cultures and cultural landscapes, and a much slower pace of life, attracted amenity migrants who chose to live less materialistic lives while seeking more solitude and spirituality. A parallel condition was identified in similar research undertaken in the bioregions of Chiang Mai, Thailand (Callen *et al.*, 1993; Moss, 1993) and Santa Fe, New Mexico (Moss, 1986, 1994; Glorioso and Moss, Chapter 5, this volume).

Leisure was not generally identified as a motivating factor in my field studies (1993, 1999, 2004), although Baguio's leisure offerings and IC infrastructure considerably improved during this time. This indicates that the bioregion's level of comfort and convenience may still be too low to attract leisure-motivated amenity migrants. In addition, my 2004 analysis in particular indicated that Baguio amenity migrants were not especially attracted to the leisure activities of the urban centre, but rather these amenities were considered more for the tourist. Those attractive to Baguio amenity migrants were more family-oriented, such as going to the beaches a 1 to 1.5 h drive away. Outdoor recreation, mountain climbing and hiking, etc. also attracted amenity migrants, but typically the unmarried and artists seeking solitude, many settling in Sagada. Again, this re-enforces the Leopold-like progression discussed above.

Importantly, key informants consistently identified the lack of discretionary time among Baguio amenity migrants, although IC infrastructure and access improved considerably from 1993 to 2004. Results of global research on this subject are mixed. Some studies indicate that leisure time has considerably decreased, along with a dramatic increase in IC users (Rifkin, 1995; Goozner, 1998; US Council of Economic Advisers, 1999; Taylor, 2004). Others disagree (Jacobs and Gerson, 1998; Espring-Andersen, 1999; Bittman and Wacjman, 2000; Gershunny, 2000; Goodin *et al.*, 2002), suggesting that poor time management and different perceptions of what 'discretionary' means lead people to believe they do not have discretionary time. The latter seems more appropriate for

Baguio amenity migrants. Since the majority of them are socially and economically active and many participate in local decision making, especially regarding environmental protection, they appear to have a tendency not to perceive leisure time as separate from work or deemed essential social activities. So they do not perceive themselves as having discretionary time.

Access to the bioregional centre, especially by air travel, had considerably improved since 1993, which was probably the significant variable for the considerable increase of intermittent amenity migrants between 1999 and 2004. The 1993 intermittent type travelled mainly by road between Baguio and Manila, while a much larger proportion of them travelled by air in 1999 and 2004. In addition, while intermittent amenity migrants were solely Filipinos in 1993, there was an increasing numbers of foreign intermittent amenity migrants in 1999 and 2004, particularly Taiwanese, Koreans and Japanese, flying from their countries of origin via Manila.

The number of seasonal amenity migrants remained low from 1993 to 2004; Filipinos and foreigners alike. In general, these longer-term migrants were still Filipino socio-economic elite, and foreigners residing in the bioregion during winter in their home countries. In addition, previously seasonal, middle-income Filipino amenity migrants appeared to have evolved into permanent amenity migrants as their discretionary income increased or they found a source of income in the bioregion. Others who found employment outside the bioregion, particularly in Manila, became intermittent amenity migrants, and typically had more discretionary money than middle-income permanent amenity migrants. Middle-income Filipino seasonal amenity migrants seemingly disappeared from about 1993, because they either could not be away from their employment elsewhere for a season, or no longer could afford to maintain a house in the bioregion or rent for a season. Property values have increased since 1993 by about 120%. In general, the bioregion's seasonal amenity migrants are wealthier than permanent amenity migrants and own larger properties, which, except for a caretaker, remain vacant most of the year.

Over all, amenity migration in the bioregion was viewed by the majority of informants as an opportunity, because it: (i) provides a more stable

economy compared to tourism; (ii) widens locals' world view; (iii) helps position the bioregion as a player in the globalizing economy; (iv) bestows on the bioregion, albeit yet small, a cohort of intellectual, social, and political elite with resource-conserving ethics and inner directed values and behaviour; and (v) should encourage more equitable distribution of services and resources, particularly water. However, my own and other informants' observations indicate other AM attributes. Although many amenity migrants participate in the bioregion's environmental protection, very few appeared to work on social issues, including poverty and empowerment of indigenous peoples. Those doing so were principally motivated by learning and spirituality as defined in this chapter. In addition, it was unclear to what extent amenity migrants involved in environmental protection were concerned about the environment and not how environmental problems like squatting or view shed degradation affected their property values.

The Most Likely Future: a Trends Continue Scenario (1995–2025)

In my 1993 research, 42 key decision factors were identified for understanding Baguio bioregion's amenity migration. These were clustered into global, regional, national and local levels of focus, and synthesized into the following two societal driving forces governing the world of the bioregion's future amenity migration: (i) awareness within Philippine society of the opportunities and threats of the amenity migration phenomenon; and (ii) management capability of the public, private and parastatal sectors of the opportunities and threats the phenomenon has or may create (Dimaculangan, 1993).

Four alternative future scenarios were then derived from the societal driving forces for the 1995–2020 periods (Fig. 18.4). In late 1993, as part of the AIT planning assistance to Baguio, these scenarios were presented to the town's Mayor and local NGO representatives, who then chose Scenario B: 'Some Dreams Do Happen' as the most probable future for their bioregion. This was, and remains, a most optimistic and desirable future. However, choosing it eliminated serious problems the city faced and still

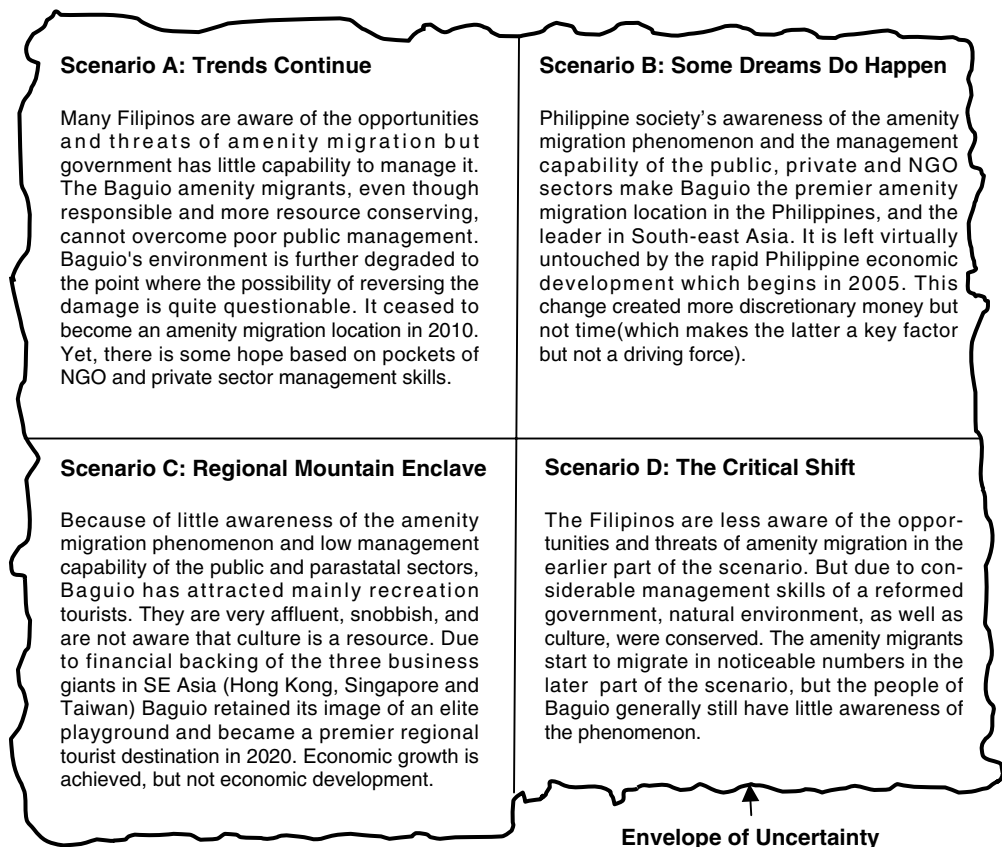


Fig. 18.4. Alternative futures of Baguio amenity migration (1995–2025). Source: R.S.G. Dimaculangan (1993).

faces, including critical issues for maintaining and rehabilitating the bioregion's natural environment. This choice could have seriously compromised the strategic actions being considered, but in fact little follow-on has taken place until the present, principally due to the fatigue of local champions around 2000.

Here I use Scenario A: 'Trends Continue', the alternative scenario considered most realistic by some Baguio NGOs and analysts in both 1993 and 2004. The choice is also grounded in my 2004 assessment that the two driving forces and four alternative future scenarios remain quite viable as the context of future Baguio AM (Fig. 18. 4). Also, from a calibration of Scenario A in 2004, it was ascertained reasonable to extend

it from 2020 to 2025. Below are the key characteristics of this most likely scenario.

'Trends Continue' scenario key characteristics (1995–2025)

These key characteristics are manifest in three spheres of influence: global (G), national (Philippines) (N), and local (Baguio bioregion) (B).

- 1.** Globalization stalled due principally to Europe and poorer countries smarting from the USA's domestic public subsidies and related corporate expansion while professing global free trade. (G, N)

2. Moderate to high political tension is managed by negotiations of dominant powers. (G, N)

3. IC technology continues to develop with emphasis on leisure and health industries. However, there is a growing gap of access to and understanding of the fast-evolving information society. This condition is apparent within economically developed countries and between economically developed and less-developed nations. (G, N, B)

4. High-tech manufacturing activities, and the associated knowledge-intensive service sector, including universities and research centres, continue to locate in mountainous regions with efficient airports. (G, B)

5. Personal achievement, consumption and growth values, combined with leisure, predominate throughout the scenario period. This is most pronounced in economically developed nations, but is emulated in less economically developed ones. (G, N)

6. A small but growing number of learning- and spiritually motivated amenity migrants locate in mountainous environments with relatively intact indigenous cultures, although globally amenity migrants are predominantly leisure oriented and resource consumers. (G, N, B)

7. Public officials view alternative tourism, such as eco, cultural and ethnic tourism, as a panacea for tourism ills, while also a comparatively easy way to earn hard currency. Many economically less-developed mountain regions adopt it as their main industry without understanding its complexity and it reaches the levels of mass tourism in many accessible places by 2008, and in most by 2015. With few resources committed to environmental protection and diversification of economic base, amenity attributes of many mountain bioregions are seriously degraded. (G, N, B)

8. Indigenous peoples continue to lose control over their ancestral lands under the guise of protected areas, watershed protection and economic development through minerals, gas, oil, timber extraction and progressively through recreation facilitation. The empathy disparity gap between indigenous peoples and others widens. (G, N, B)

9. International environmental NGOs generally continue to ignore the role of indigenous peoples in sustaining mountain ecologies. (G, N, B)

10. Due to degraded mountain environments, increasingly high carbon-based fuel costs (with slow transition to alternative energy sources) and improvement in IC technology, much leisure shifts to virtual reality tourism, theme parks, artificial environments, mega malls and urban cultural tourism. Only the very wealthy visit the few remaining remote and relatively pristine mountain places on the planet. In 2020 space tourism is initiated, but economically poor countries cannot compete as it entails major capital investment. (G, N, B)

Key issues in the 'Trends Continue' scenario

Although the future of AM in the Baguio bioregion appears bleak in the 'Trends Continue' scenario described above, its course can be changed by identifying its strategic key issues, so that the bioregion's limited financial, human and natural resources are tactically allocated. Through strategic analysis of the strengths and weaknesses of the bioregion, and the threats and opportunities of the chosen scenario, six overarching critical policy issues were identified. While these issues are separately outlined here, they are quite systemically interdependent, and should be treated as such when moving from strategy to tactics or action planning. Other issues were identified, but the following six appear the most significant and strategic for taking advantage of AM's potential opportunities while controlling its negative impacts.

1. Public officials typically lack appropriate management skills and political will to shift the bioregion's economic focus from tourism to a more stable and resource-conserving activity, especially appropriate amenity migration and the learning industry. In addition, planners are reactive. These are vital flaws where government is expected to guide socio-economic development. The decision makers are also narrowly focused on their respective administrative jurisdictions.

2. The proliferation of illegal land occupation of watersheds brought about by a complex set of factors, most of them seemingly beyond the authority and power of the bioregion's local

authorities. National poverty surmounts these factors, thus in-migration of the poor to a comparative economic bright spot – Baguio. Local governments have inadequate skills and land to rationally tackle this problem, especially with the national government jurisdiction dominating *de jura* and *de facto*. There is also the complacency of the local elite. Information indicates much of the squatters' housing is owned by elite, absentee landlords. A further complication is the absence of effective self-help among the squatters.

3. Continued heavy dependence of local governments on the national government for funding infrastructure important to protecting the environment and supporting the learning industry, while not taking advantage of recent legislation giving them greater revenue-raising scope and independence.

4. Lack of effective collaboration among local businesses and other organizations (such as research and teaching institutions, chambers of commerce, banks, government agencies and NGOs) to take advantage of the existing learning industry in the bioregion. This is necessary to compete in the new economy, especially through creating a distinctive habitat to attract learning amenity migrants.

5. National government's lack of recognition of the stewardship role indigenous peoples play in sustaining the bioregion's amenity attributes. This is manifest in many ways. One example is the government's continued claims to tribal peoples' ancestral lands as public lands and therefore viewing indigenous communities as squatters or trespassers. Rood and Casambre (1994) specifically pointed out that this lack of security of tenure among the indigenous peoples to the land they have inhabited since time immemorial is a major issue for sustainability (see also Billy, Chapter 10, this volume).

6. Inadequate and inappropriate attention given to addressing the bioregion's environmental and socio-economic problems. Although a number of environmental rehabilitation projects are being undertaken in the bioregion, little attention is typically given to related socio-economic welfare of the indigenous peoples and poor economic migrants. The condition of the indigenous peoples is worst. Available information indicates that they are less educated, more involved in pre-industrial activities, have less access to IC tech-

nologies and therefore materially poorer than lowland in-migrants (NEDA, 2003).

Meeting Baguio Bioregion's Challenge

Based on the unfolding 'Trends Continue' scenario, the Baguio bioregion, particularly the Baguio urban area, appears to have a window of opportunity of less than a decade before its mountain environment is degraded to a condition that would be extremely difficult and costly, if not unfeasible, to rehabilitate. However, the following four strategic actions could be used to address the key policy issues identified above. These actions may be found variously described in relevant literature, but not as a strategic, systemic whole, nor in response to the needs of this specific place. To succeed, the bioregion's local governments should undertake all four actions simultaneously.

Action one

Strengthen public officials' decisiveness and ability to act by improving their management and planning skills through the following key tactics:

1. Promote and reward the atypical, innovative public officials. They exist, but need to be in key decision-making and support positions. One promising source is the learning-motivated amenity migrants, the type who are already playing useful roles in the bioregion. They need to organize for playing even more strategic roles, and could be a source of the 'champions' usually needed for redirection.

2. Use a bioregional ecosystemic approach (BRES), wherein the understanding and managing of ecosystems is approached in a regional context based on natural ecological characteristics, rather than primarily based on jurisdictional divisions created by the state. The main advantages are that it: (i) promotes sound ecological decisions in managing growth, since a bioregional delineation is based on the working of natural systems and their manifestations, along with the inhabitants' sense of the bioregion; (ii) promotes systemic integration of physical, social,

economic and cultural components, including aesthetics, environmental, political and technological aspects in planning and decision making; (iii) enhances public participation and coordination among local governments, NGOs, private businesses and academia, in decision making and plan implementation, because a decision or a plan is less politically or jurisdictionally based and more ecologically and culturally grounded; which leads to, (iv) developing ownership by community members and so increases the chance of decisions and plans being implemented successfully; (v) facilitates economies of scale associated with designing and delivering infrastructures such as telecommunication, transportation and health care systems; and (vi) promotes a more equitable distribution of wealth.

Action two

Promote the learning sector of the bioregion's economy. Important tactics include:

1. Attract particularly amenity migrants who are motivated by learning. These migrants especially have the appropriate orientation toward the new economy and, second, appear inclined to bring or create enterprises that not only have higher-paying employment with local multiplier effects, but are environmentally friendly, as they use knowledge to produce a service or product.
2. Improve IC technology and the level of comfort and convenience in Sagada and Banaue. This may include starting a commercial flight from Baguio City to these two satellite centres.
3. Focus on attracting tourists who are motivated by learning and spirituality (tourists interested in the ecology and life ways of the indigenous Ifugao, contemplation of the landscape beauty, etc.). Because tourists who really like a place often find a way to migrate there (Moss, 1986; van den Berghe, 1992; Dimaculangan, 1993; Leinberger, 1994; Stewart, 2002).

Action three

Close the widening gap between the information 'haves' and 'have-nots'. In the bioregion, typi-

cally the latter are the socio-economic and politically marginalized indigenous people and poor in-migrants. The following tactics are suggested:

1. Attract more amenity migrants who are motivated by spirituality; not only are they characteristically more ecologically aware, but they also appear concerned about social equity. In addition, they tend to be the in-migrants most active in community development, especially local people's empowerment and sustainable development.
2. Encourage the environmental NGOs to shift their focus more to socio-economic welfare of the poor squatting on watersheds, along with broadening their membership and public support base.
3. Increase awareness among the general population of the importance of the indigenous people for maintaining the bioregion's amenities. Basic should be an environmental curriculum in schools, and one that includes this awareness.
4. Compensate the indigenous people fairly for their stewardship role in sustaining the mountain ecology, which many amenity migrants and tourists are attracted to. For example, part of the sales and lodging taxes should go to indigenous people (see especially Godde *et al.*, 1999).
5. Ensure equal access to both formal and informal education, including special attention to the information-access disadvantaged. The new economy jobs require more theoretical and analytical knowledge than 'have-nots' in the bioregion, and the Philippines more generally, have. Part of this tactic would be encouraging and rewarding private enterprises and individual donors who give scholarships to economically poor students graduating from the bioregion's high schools.
6. Take advantage of the 1991 Local Government Code that expanded the scope and independence in revenue generation of local authorities to fund the programmes and projects suggested above. For example, the bioregion's municipalities should adopt progressive property tax to have especially their wealthy residents, and particularly the intermittent and seasonal amenity migrants, compensate for their typical inefficient use of resources, particularly land and water. They should also withdraw local tax exemption privilege from national government-owned vacation homes, which occupy 60% of

the total residential land of Baguio City. Moreover, local government should stop paying for the electricity and water used by these 'white elephants'.

Action four

Develop local civic culture to provide the bioregion's citizenry greater access to decision making and guide public officials in formulating and implementing public policies. Suggested tactics are:

1. Harness the bioregion's youth, who are the majority of its population. For example, in Baguio City in 2004 there were 100,000 college students. They have some discretionary time, and what greater opportunity and timing to instil in these youth local citizenship responsibility, increase their awareness of their impact on their environment and responsibility to others, as well as increasing their ability and opportunity to work collaboratively towards a common vision.
2. Take advantage of the national government's retirement programme, which presently promotes amenity migrants' location in the country's coastal zone. The Baguio decision makers could focus in particular on attracting US and EU retirees with discretionary time and income, and who are inclined to sustain or improve the bioregion's natural environment and social welfare. AARP (2002) categorized such American retirees who are quite involved as local volunteers where they resettle as 'Crusaders' and 'Super Volunteers'.

Moving into an Ecological Age

Amenity migration is a relatively new phenomenon whose impacts have already considerably degraded the amenity attributes of especially materially poorer mountain places where indigenous cultures still exist, like the Baguio bioregion. With information replacing land and labour for generating wealth in the new economy, indigenous and less-educated people find it difficult to

survive from agriculture or by moving to the new economy centres. In either case, they are contributing to the degradation of amenity attributes and their own quality of life. However, unlike in the industrial age, it is not only possible for more people to create greater wealth in the new economy, but more importantly, economic activities can be more environmentally friendly. With an appropriate amenity migration strategy to further develop the bioregion's learning industry, and effective resource management principles and practices, including reducing social inequity, it is just possible for the Baguio bioregion to pass through an information age to an ecological age in which humans live harmoniously with nature – eco-living.

Baguio bioregion's key attributes are the existence of a small cohort of learning- and spirituality motivated amenity migrants, the growing learning industry, relatively strong, local environmental NGOs and still being a relatively attractive place to live. But even with all this, if the bioregion continues to rely on tried and not so true conventional mechanisms, its problems are probably insurmountable. Taking a calculated risk on innovation seems imperative (see also Perlik, Chapter 15, this volume).

Initially those already aware and committed to sustaining the Baguio bioregion need to better organize, broaden their mission and identify strong champions. Also, a capacity to generate strategic data on amenity migration and natural hazard preparedness must swiftly be put in place. These seem essential for implementing the above four strategic actions. In addition to the anticipated positive results outlined above, the bioregion should then be better prepared to manage other future challenges, particularly global warming.

To date, one usually needs some combination of discretionary time, wealth and access to IC technology to move to mountain areas. With global warming's continuing increase in sea level, heat waves, droughts and floods, one may not have a choice but to move inland and up into the mountains, especially in small, tropical island countries like the Philippines. For Filipinos, Baguio bioregion is obvious for relocation, not only for its amenity attributes, but because it is the largest, most contiguous mountain ecosystem

in the Philippines. However, it is a fragile ecosystem also prone to natural disasters, as experienced in 1990 and 1991. Its soils are relatively poor and less fertile, which once deforested readily become barren and degraded with compara-

tively slow rates of recovery. Thus, if the bioregion's environmental and social issues are left unresolved, it cannot possibly recover from past misuse, nor support human in-migration, for amenity or otherwise.

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19 Green Change: Inland Amenity Migration in Australia

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Introduction

Amenity migration is becoming a significant area of research. Most of the work to date has been carried out in the USA, and to a lesser degree in Western Europe. Recent reviews and major regional case studies include Johnson and Rasker (1995); Price *et al.* (1997); Boyle and Halfacree (1998); Duane (1999, 2004); Shumway and Otterstrom (2001); Stewart (2002); Johnson *et al.* (2003); Hunter *et al.* (2004); and Moss (2004, Chapter 1, this volume). In addition to the lifestyle preferences of individual people, such reviews have considered issues such as jobs and wages, living costs, taxes, retirement, mailbox economies, footloose businesses, technologies, tourism, turnover, community change, infrastructure and resource impacts. In Europe, the issues are phrased somewhat differently (Glorioso, 1999; Gordijn and de Vries, 2004; Dijst *et al.*, 2005; Elbersen, 2005; Prados, 2005; Perlik, Chapter 15, this volume).

Amenity migration also occurs in Australia but appears to be far less studied, especially for mountain and inland regions. There has been work on various aspects of population mobility (e.g. Bell, 2001). However, there seems to be nothing like the depth and duration of research on amenity migration which is available in North America and Europe. There do not even seem to be analogues of case studies such as those in Zimbabwe (Tonderayi, 1999) or the Philippines

(Moss and Glorioso, 1999; Moss, 2004). Indeed, it seems to be only very recently that amenity migration to Australia's mountain and inland regions has attracted the attention of the research community. Of course, it has been known to relevant real estate and property agents, banks and finance institutions, local governments and state government planning agencies and the migrants themselves – but on a piecemeal basis, with no coordinated analysis.

Here, therefore, we describe what seems to be a first attempt at systematic analysis of amenity migration to mountain and other inland areas in Australia. We have compiled and considered data from a range of relevant sources, to address two principal questions: (i) can we demonstrate that amenity migration is actually occurring in specific inland areas; and (ii) if so, what are its characteristics?

Migration in Australia

Our aim here is to examine the most recent phase of domestic migration, to inland areas with particular recreational, scenic and lifestyle opportunities, to determine how closely it corresponds to amenity migration patterns in North America and elsewhere. This recent internal in-migration has not yet become a major trend, and it must be considered in context: Australia has undergone many waves of immigration and

many previous episodes of internal migration, and as elsewhere (Williams and Hall, 2002), there are complex current patterns of internal circulation and seasonal migration (Bell and Newton, 1996; Bell, 2001).

Major immigration episodes include: the arrival of the Aborigines several tens or hundreds of thousand years ago; colonization from the United Kingdom a little over 200 years ago; subsequent immigration from various European nations after the Second World War and various Asian nations a few decades later; and most recently, the entry of refugees and others from Middle Eastern and other nations subject to conflict.

Early phases of internal migration were largely related to economic opportunities, real or perceived. Examples include: gold rushes to various remote areas; the movement of squatters to take up from land in rural areas; the expansion of timber getters into forested areas; and the movement of labourers into cane-growing areas.

Historically, the principal amenity-related migration pattern within Australia has been focused strongly on the coastline. People whose primary residences and incomes were in the state capital cities have bought rural coastal land and built holiday shacks, second homes and principal or retirement residences along less-developed sections of the coast. Initially, such development was centred on fishing villages, most located on and around headlands and river mouths. As land

prices rose and demand exceeded supply in those areas, developers started to buy and subdivide farmland bordering on beaches: as acreage allotments, as suburban-style housing estates or as canal developments. This was first recognizable as a significant and coherent pattern at least three decades ago. Most of the east, south-east and south-western coasts of Australia have now been subject to development of this type, at least wherever there is fresh water, access and private land tenure. The associated migration patterns, which are comparable in some ways to those within Europe, have been studied extensively (Australian Bureau of Statistics, 2004; Burnley and Murphy, 2004) and even spawned a TV series, *Sea Change* (Australian Broadcasting Corporation, 2004). Patterns, planning frameworks and legal issues have differed between states and regions. In most coastal areas with high amenity, absolute ocean-front is now extremely expensive.

Perhaps partly because the coast is now crowded, over the past decade or so a new amenity migration pattern has become discernible within Australia, focused instead on inland areas with recreational and lifestyle opportunities (Fig. 19.1). This pattern is hence much more comparable to that occurring over recent decades in the western states of the USA and the south-western provinces of Canada (Johnson *et al.*, 2003; Johnson, 2004; Moss, 2004). The degree of demand and density of amenity migrants in inland



Fig. 19.1. Hikers on the popular Lakes Walk, Kosciuszko National Park, Australia (photograph: C. Kelly, December 1999).

Australia does not yet match that in, for example, the Sierras in California, the Rocky Mountain states of Wyoming, Idaho and Montana or the Kootenay and Okanagan corridors of south-eastern British Columbia, Canada. It does, however, potentially seem to be at the beginning of a similar path. Here, therefore, we investigate to what degree such migration is actually occurring to inland amenity areas and with what consequences. This is a relatively new phenomenon in Australia and does not seem to have been documented or analysed previously.

To select the broad regions for study we used five main criteria: geographical location; climate and scenery; recreational and lifestyle opportunities; recognition as a tourist destination; and informal evidence from our own experience and the comments of our professional colleagues in tourism, real estate, protected area management and related disciplines. None of these factors is definitive: they must be considered jointly. In Australia, for example, we would not expect significant amenity migration to the arid landscapes of central Australia, even though they are an important tourist destination.

Different people enjoy different types of climate and recreation. Some want snow, skis and steep slopes; some want lakes, boats and fish; some want rainforest, hiking boots and watchable wildlife. Most people want easy access for themselves through well-developed transport and communications infrastructure, but protection of nearby land tenure so their amenity values are not eroded. The preferred areas hence tend to be close to national parks, and often close to gateway communities which already have infrastructure and available private land. People also want adequate fresh water and reasonably equable weather, whether tropical, temperate or montane.

Broad Patterns and Available Data

We have been accumulating personal observations and anecdotal information on amenity migration to mountain and other inland areas in Australia over the past three decades. Such evidence includes, for example: changes in the number, type and décor of retail shops in relevant rural townships; the appearance and increased frequency of property sales brochures

in tourist information outlets in such areas; the establishment, increased circulation and increased frequency of property sales advertisements in specialist upmarket magazines with 'High Country' themes; and stories of individual people, mentioned by name, who have moved to particular high-country areas as amenity migrants.

These observations suggest that inland amenity migrants in Australia fall into several rather different categories, and that different types of amenity migrant predominate in different geographic areas. Relatively few fit the stereotype of wealthy professionals in the finance and information industries who can use modern communication technologies to maintain a highly paid metropolitan career from a remote rural location. There are also retirees, some wealthy and others less so, and many semi-retired people searching for new challenges and social opportunities through farm work or tourism. There are young families searching for areas with a small-town environment to raise children in an area perceived as low in crime. There are other younger in-migrants who move for a year or two only, taking local employment to pursue recreational opportunities. There are artists and writers seeking inspiration from nature. And there are political or cultural refugees, international or internal, who are simply escaping city society.

Target or destination areas for inland amenity migration in Australia can usefully be considered in three main categories. There are areas around the ski resorts of the Victorian Alps and the Snowy Mountains, which attract both wealthy investors and younger ski enthusiasts who work at the resorts. This is similar to Canada and the USA. There are areas adjacent to the national parks of the Great Divide, the mountain spine inland of Australia's eastern coastline, which are nominally pastoral properties but which in fact are often largely uncleared, highly scenic and attractive to early retirees and semi-retirees. Examples include townships such as Dorriggo and Ebor in northern New South Wales (NSW). Similar but distinct are recently developed wine-growing areas, where amenity migrants can benefit from tourists visiting wineries without having to operate wineries, themselves. The region around Stanthorpe on the Queensland/NSW border provides an example. And there are former logging towns, where low-key

housing on small acreage was available very cheaply for some years. The small towns of the Atherton region in northern Queensland provide a good example. Once these areas start to attract tourists and service industries, however, their prices and character change rapidly. This has occurred both around Atherton and around some of the small towns of inland north-eastern NSW, such as Uki and The Channon.

There are apparently as yet no previous published data or rigorous investigations of amenity migration to inland areas of Australia. We therefore made use of several independent sources of secondary data which were compiled for other reasons but can nonetheless provide evidence for amenity migration. We examined four separate sets of data, as outlined in Table 19.1. The rationale for using each of these data sets, their relevance to amenity migration and their limitations are outlined in following sections. In summary, each of these approaches and data sets has its shortcomings, but each can shed some light on amenity migration. Where several approaches yield similar results, therefore, we can be reasonably confident of a real pattern or trend. We did not carry out any on-site surveys or interviews with residents, but we are broadly

familiar with the areas concerned through several decades of travelling to and through them, for both research and recreation.

National Censuses

The most direct, comprehensive and potentially most detailed data on any form of in-migration, amenity driven or not, is that collected for the 5-yearly national census by the relevant Australian federal government agency, the Australian Bureau of Statistics (ABS). Census information has three particular advantages. First, nominally it covers every person in the country, and in practice at least 98%; i.e. it provides data on the entire population of each region, not merely a sample. Second, there is a legal obligation to respond truthfully, so census data are far more reliable than surveys. And third, the 2001 census asked everyone where they lived 5 years earlier, and this information can be used to measure in-migration rates directly. The census also asks everyone a wide range of questions about age, education and employment.

There are three major weaknesses of census data for examining amenity migration, however.

Table 19.1. Sources of data on Australian inland amenity migration.

Data set no.	Scale, area	Type, info	Original purpose	Source, owner	Detail, resolution	Sample size	Date(s), currency
1.	Four selected regions in three states	in-migration, education, employment, age	5-yearly population census	Australian Bureau of Statistics	collection district, of approx. 225 households	142 districts, ~ 55,000 people	1991 1996 2001
2.	Two selected regions	land values and sales histories	land taxes and rates	Valuers General, Qld & Vic	individual properties	~ 20,000 property prices	various, last 10 years
3.	National, selected areas	advertisements, land and houses for sale	realtor and property agent marketing	realtors and agents	individual properties	~ 100 agents, ~ 1,000 properties	2005
4.	National, all areas	land and business statistics, family attitudes, motivation	farm tourism research	Ollenburg (PhD data)	individual families	~ 200 families and businesses	2004–2005

First, because of privacy constraints, the Australian Bureau of Statistics is not permitted to release data on individual people or households, but only aggregate data for statistical collection districts, generally covering around 225 households each. Even this, however, represents much finer spatial resolution than the scale of counties or shires, commonly used for past analyses of inland amenity migration in the USA. Indeed, this also appears to be the first analysis of in-migration at the collection district scale within Australia. Third, the areas of individual collection districts differ greatly; and their boundaries are highly irregular, are sometimes changed between censuses and generally run radially rather than concentrically around rural townships. And finally, the census is only conducted once every 5 years, and the last was 4 years ago in 2001. Despite these limitations, census data provide a reliable way to identify areas with high in-migration over a 5-year period, and to compare education, income and employment patterns between districts with different proportions of in-migration.

Our approach was straightforward in concept but proved complex in practice. Using the five criteria outlined earlier, we identified broad regions where amenity migration is most likely to be occurring. Within those regions, we examined spatial patterns in recent population changes, so as to identify areas with high gross in-migration and/or particularly large net increases in resident population. We compiled data on natural amenity factors and on demographic characteristics commonly associated with amenity migrants, both for these high-growth areas and for surrounding areas with little population change, and tested for statistically significant patterns and associations using several different approaches, as described below. The major obstacles to this approach were shortcomings in relevant data and limitations on accessibility and availability. The former include scarcity of historical data, patchiness in current data, changes in data collection parameters and relatively coarse spatial and temporal resolution. The latter include privacy restrictions, cost and volume.

One factor that complicates these analyses is that the censuses record all individuals present in any dwelling on the census date, whether residents or visitors. Most amenity migration areas

are also tourist destinations, so census data may include a significant proportion of tourists. Since in demographic terms these tourists resemble amenity migrants rather than long-term rural residents, their presence confounds the comparison between census collection districts (CDs) with high and low in-migration. Fortunately, census data does distinguish residents and visitors, and we based our analyses on residents only.

For this approach, we focused on four principal regions: the high country of the Victorian Alps; the Snowy Mountains region of southern New South Wales; the wine country near Stanthorpe in southern Queensland; and the Atherton Tablelands inland from Cairns in north Queensland. Each of these areas is too far from the nearest cities to be used as a commuter or dormitory area, but close enough to be accessible for weekends. The first two are close to Australia's principal ski resorts and also to the montane national parks which are major summer tourism destinations. They are accessible from the state capitals of Melbourne and Sydney respectively and also from the national capital of Canberra. The Stanthorpe area is accessible from the major population centres of the southern Queensland coast, both the capital city of Brisbane and the resort city of the Gold Coast, and nearby national parks are significant destinations for self-drive holidays and coach tours. The Atherton Tablelands is the hinterland of the tropical town of Cairns, now a major nature and adventure tourism destination. Indeed, the tablelands are now marketed as the Cairns Highlands.

Within these four main regions, specific study areas were delimited as follows. First, we identified all rural towns and settlements with a significant tourism industry within 20 km of a national park. Next, we defined a zone of 20 km radius around each of these townships, and identified all census CDs which intersected this zone. Finally, we combined all those collection districts to delimit a ragged polygonal study area in each region. CDs differ greatly in size and shape, so the spatial resolution of census data is finer in more densely populated areas.

The four study regions included from 26 to 46 individual CDs each, and covered areas of 5000 to 12,600 km² respectively. Census dates used were 1991, 1996 and 2001. The study regions were large and broadly defined so that

relatively few of the individual CDs in each study region are likely to have experienced significant amenity migration. Population changes do occur between census dates in almost all CDs, but these may be due to a wide range of local factors such as births, deaths, marriages, people changing jobs and children leaving home.

For each collection district we compiled three sets of data. The first set comprises three primary population measures: specifically, the total resident (non-visitor) population in 2001; the net population increase since 1991; and gross in-migration over the 5 years to 2001.

The second set consists of 16 secondary demographic indicators of amenity migration, as used in previous studies (Stewart, 2002; Johnson *et al.*, 2003; Hunter *et al.*, 2004; Moss, 2004). These secondary indicators include: age, income, level of education and employment sector. After some preliminary analysis we focused principally on ten secondary demographic parameters: the total number of people in 2001, and the increases in numbers of people between 1991–2001 who: (i) had a university degree; (ii) had an annual income over AUD\$35,000; (iii) were over 50 years old; (iv) worked in the finance and property sector; and (v) worked in tourism services.

The third set consists of 11 geographic indicators of natural amenity: percent cover of forests, lakes, national parks and rural land; length of rivers and steepness of slopes; distances to airports and park access points; mean annual rainfall; and two bioclimatic indices, the physiological equivalent temperatures (PET), used as measures of heat stress.

We used an iterative approach to search for evidence and characteristics of amenity migration. All statistical analyses (N. Sander and R. Buckley) were carried out using SPSS® 12.0.5. As with all such highly multivariate analyses, there is a trade-off between transparency, which is highest in visual comparisons of individual variables using map overlays, and completeness, which is highest using statistical comparisons of multiple variables compressed through principal components analysis. Our approach was as follows.

1. Examined overall variation in each parameter across all CDs.
2. Mapped each individual migration, demographic and natural amenity parameter in each region (N. Sander and J. Warnken) using

MAPINFO® Professional 7.5, ARCVIEW® GIS 3.2 and ARC-GIS 8.3, and compared patterns visually.

3. Calculated bivariate correlations amongst demographic parameters, and independently amongst natural amenities parameters, both across all four regions simultaneously and for each region separately.

4. Carried out principal components analyses, both across all four regions jointly and for each region separately, of the demographic parameters (Table 19.2) and independently the natural amenities parameters, and mapped CD scores on first, second and third principal components (PCs) in each case.

5. Calculated correlations between CD scores on each principal component of the demographic parameters, each principal component of the natural amenities parameters and in-migration from 1996 to 2001.

6. Calculated bivariate correlations between the various raw demographic parameters, the various raw natural amenities parameters and in-migration.

7. Multiple regressions over all 142 CDs of in-migration rate against demographic parameters, and separately against natural amenities parameters.

8. Analysis of variance and t-tests of each demographic parameter, and each natural amenities parameter, between CDs with high (>20%) in-migration 1996–2001, and those with low (<20%) in-migration.

Caution is needed in interpreting results from these analyses, for several reasons.

1. Demographic parameters for each CD reflect all residents in that CD in 2001 and all changes 1991–2001, not only in-migrants from 1996–2001.
2. Some of the parameters are quite strongly correlated with each other. In particular, most of the demographic parameters in 2001 are correlated with changes in the same parameters from 1991–2001, with correlation coefficients >0.72 across all regions, and up to 0.92 for individual regions.
3. For bivariate comparisons, since there are large numbers of individual comparisons, there is the potential for spurious results from pairwise significance testing.

Table 19.2. Principal components analysis of demographic indicators.

Parameters	Factor 1	Factor 2	Factor 3
Victorian Alps			
Variance explained,% Factor Loadings	28.3	24.9	14.4
University degree, 2001	+0.91	-0.11	-0.08
Income >\$35000, 2001	+0.75	-0.23	+0.54
Older than 50, 2001	-0.67	-0.53	+0.28
Working in property, 2001	-0.13	+0.83	+0.30
Working in tourism, 2001	+0.38	+0.29	-0.14
Snowy Mountains			
Variance explained,% Factor Loadings	24.8	19.5	16.5
University degree, 2001	+0.72	+0.12	+0.11
Income >\$35000, 2001	+0.61	+0.70	-0.14
Older than 50, 2001	+0.09	-0.11	+0.92
Working in property, 2001	+0.58	-0.46	-0.48
Working in tourism, 2001	-0.18	+0.48	-0.12
Stanthorpe			
Variance explained,% Factor Loadings	39.3	20.5	14.7
University degree, 2001	+0.89	-0.18	+0.05
Income >\$35000, 2001	+0.81	+0.07	+0.41
Older than 50, 2001	+0.65	-0.17	+0.16
Working in property, 2001	-0.08	+0.81	+0.46
Working in tourism, 2001	-0.59	-0.41	+0.62
Atherton			
Variance explained,% Factor Loadings	42.8	14.4	12.2
University degree, 2001	+0.86	+0.14	-0.02
Income >\$35000, 2001	+0.80	-0.17	+0.18
Older than 50, 2001	+0.71	-0.58	-0.07
Working in property, 2001	+0.55	+0.60	+0.25
Working in tourism, 2001	+0.52	+0.39	-0.61
All Regions			
Variance explained, % Factor Loadings	26.6	18.6	15.5
University degree, 2001	+0.83	-0.02	-0.12
Income >\$35000, 2001	+0.82	-0.16	-0.32
Older than 50, 2001	+0.28	-0.30	+0.83
Working in property, 2001	+0.22	+0.82	+0.02
Working in tourism, 2001	+0.20	-0.17	-0.41

4. Comparisons between CDs with high and low in-migration are highly asymmetric, with relatively few CDs experiencing high in-migration, and most showing little or no significant change between 1991, 1996 and 2001 censuses.

5. There are large-scale differences in land use history and land tenure between the four regions and consequent differences in the types of amenity migration; and as a result, overall patterns may be obscured when all four regions are analysed simultaneously.

6. In some cases, different types of amenity migrants have been attracted to different CDs in the same overall regions, for example, wealthy land purchasers as compared to much less wealthy ski fields' workers.

7. The income cut-off of AUS\$35,000 is relatively low, effectively a threshold between people who have full-time employment and those who do not, and not high enough to distinguish potential property buyers in expensive areas.

All these approaches yield similar results. The patterns may be summarized as follows. In the Victorian Alps, and less strongly in the Snowy Mountains, CDs with high in-migration 1996–2001 also had significantly more residents in 2001 who had a university degree, income over AUS\$35,000 p.a. and were working in tourism. Presumably, these patterns reflect characteristics of the in-migrants themselves. They do not apply in either Atherton or Stanthorpe. These associations are shown by: (i) bivariate correlations, with Pearson's $r > 0.50$ and significance $P < 0.01$ for the Victorian Alps and $r > 0.30$, $P < 0.001$ across all regions; (ii) stepwise multiple regressions, with each of these three factors significant at $P < 0.001$; and (iii) t-tests, with $P < 0.001$, $P < 0.002$ and $P < 0.001$ respectively.

In the Snowy Mountains region, CDs with a high net increase in residential population between 1991–2001 have more residents working in the finance and property sector. This probably reflects the longer history of migration and residential property development in this area. The association is demonstrated through: (i) bivariate correlations ($r > 0.30$, $P < 0.001$) across all regions; and (ii) principal components analysis, where PC2, reflecting net population growth and employment and property, is strongly correlated with in-migration, but only for the Snowy Mountains region.

In-migration is significantly higher in CD's with lakes ($P < 0.001$) and those close to airports ($P < 0.05$), as shown by: (i) multiple regressions; (ii) t-tests; and (iii) the correlation of in-migration with PC3 (lakes) from the principal components analysis of natural amenities parameters. This effect is strongest in the Snowy Mountains region. In the Victorian Alps, people tend to move to areas with rivers. In the Atherton region, in-migration is inversely related to PC1 from this analysis, which reflects parks, forests, rivers and steep terrain and accounts for 30% of total variance. This is probably because most in-migration in this region has been to pre-existing rural townships. In the other regions and overall, in-migration is not significantly correlated with natural amenities PC1.

When scores for the first factor from secondary demographic indicators in each CD are mapped, the high-scoring CDs coincide quite well with areas of high in-migration. In the Victorian

Alps these include areas around the ski resorts, areas adjacent to nearby national parks and the main access road. In the Snowy Mountains, the main access corridor is key, as well as a lower altitude area which is identified in tourist terms as 'Man from Snowy River Country'. In the Stanthorpe region, the key areas are along the wine tourism access routes north and east of town. And in the Atherton Tablelands, key areas are old logging towns now converted to tourism. All of these coincide well with anecdotal evidence of amenity migration in these areas.

There are differences in migration patterns both between and within each of the four regions. People with tertiary education and income over AUS\$35,000 seem to have migrated to all four regions, and many of them work in tourism or property. In the Victorian Alps most of these people are under 50. In the other three regions they include people both older than 50 and younger. In the Snowy Mountains and Stanthorpe, but not Atherton, there is a distinct group who are retired, i.e. older and not working. Across all regions, there is also an identifiable group of university-qualified residents with low incomes. Broadly, there seem likely to be at least four major categories of amenity migration: (i) wealthy middle-aged professionals buying high-value rural properties near ski resorts, as in North America; (ii) young temporary migrants, often with university degrees, who move to the mountains for recreational opportunities and work in the resorts and service industries; (iii) older migrants retiring to rural landscapes for lifestyle farming and/or tourism; and (iv) low-income migrants searching for low-cost land in warm weather, irrespective of employment opportunities. Because of this diversity, no single demographic indicator identifies amenity migration destinations consistently.

Land Values and Sales Histories

One of the characteristic features of many forms of amenity migration is an increase in demand for rural landholdings and a corresponding differential increase in price, especially for land with features particularly desirable for such migrants. Rural properties of a convenient size, not necessarily large enough to be viable for agricultural

production, are in particular demand. Also favoured are scenery rather than soil type, rapid access to rural townships and opportunities for recreation rather than crops or livestock. In addition, amenity migrants are likely to invest proportionally more on residential housing and less on farm buildings. Hence either rapid increases in unimproved capital values, or sudden increases in sales prices suggesting construction of new houses, may be indicative of amenity migration (Johnson *et al.*, 2003). These data are difficult to interpret with confidence, however, for various reasons. Land values are influenced by many different factors, and price per unit area depends on area, aspect, infrastructure, scenery and vegetation as well as improvements. In addition, in Australia, land taxes are charged by state governments, which may therefore revalue properties systematically if they want additional revenue. Rapid increases in unimproved capital value, therefore, are not necessarily a definitive indicator of a real market effect. Sales histories have different but equally severe limitations. On the one hand, they do represent real market prices. On the other hand, prices are affected by broad-scale booms and busts in housing markets. Increased prices may reflect construction of new buildings or infrastructure rather than increases in land value between sales; and few properties are sold and re-sold after sufficiently short intervals to construct a meaningful sales history.

Amenity migration is commonly associated with increases in land prices in destination areas. Once these increases are assimilated by relevant government agencies, increases in local government rates and in-state or national government land taxes also occur. Such increases may have various social effects, notably the 'rating out' of long-term or retired residents who can no longer afford the increased rates and land taxes and are hence forced to sell up and leave. If these departures offset the arrival of new amenity migrants, migration may not necessarily lead to net population growth, but rather to turnover and replacement of former rural residents by new amenity migrants. Such circumstances, however, are likely to be accompanied by a detectable increase in the rateable value of relevant rural land, also referred to as unimproved capital values (UCV).

In Australia, data on UCVs are held by local government authorities (LGAs) and by state gov-

ernment land valuation agencies, commonly known as Valuers-General. For this study, the Valuers-General of Victoria and Queensland kindly provided current UCVs for individual properties within our identified CDs, as sponsorship for this research. They also provided sales data and actual market prices for any sales of these properties within the past 10 years. As indicators of amenity migration, market prices have the major advantage that they respond immediately to increased demand, whereas UCVs may only be reviewed every few years and hence may not reflect the effects of AM until some time after it commences. On the other hand, UCVs are available for all properties in a given area, whereas sales histories are only available for properties which have actually been sold. In addition, market prices include not only the value of the land itself, but also of improvements such as residential dwellings, farm buildings, roads, electric power cables, fences and water supplies. An increase in sale price for an individual property may be due to a new or renovated house or other improvements, or to a national or regional housing boom, not necessarily to a local increase in land values. Since historical data on UCVs are not readily available, however, sales histories may still provide a useful adjunct to current UCVs. Accordingly, we compiled both UCVs and sales histories where available, and compared high and low in-migration areas in our Atherton and Victorian Alps study regions. Data for NSW were not yet available by the deadline for this publication. Queensland data were linked to a digital cadastral database and could hence be plotted as maps. Victorian Alps data initially were not, and were hence examined first by postcode (i.e. zip code).

Interpreting land value and price data is far from straightforward. Land values increase with land area, but not linearly: smaller blocks are worth proportionally more. Land in or near townships is usually worth proportionally more than more remote farmland, irrespective of value to amenity migrants. Different properties are resold and revalued in different years. To search for indicators of amenity migration these different influences must somehow be disentangled. The ideal approach would perhaps be a hedonic pricing model utilizing all the factors which land valuers take into account (cf. Archer *et al.*, 1996), but that is beyond the scope of this analysis.

Instead, we used three different approaches, each relatively simple. First we mapped recent values, values per hectare and sales prices, and searched visually for differences between collection districts with high in-migration and secondary demographic indicators of amenity migration and those without. Second, we graphed prices and values against land area, against year of sale or valuation and against location (postcode), separately. And third, we carried out multiple regressions of sales prices against land area, year of sale and location postcode. We also calculated regressions of 2004 values against land area and location in a similar way. Results are as follows.

In the Atherton region, in short, there seem to be no significant spatial patterns. At the scale we were able to analyse, migration in the Atherton area has not, apparently, affected land prices.

In the Victorian Alps, the pattern is very different. We examined trends in values and prices per hectare in each of 11 postcode areas in the Alpine Shire, over the past two decades. Values and prices per hectare vary widely, but the upper margins have increased markedly in recent years in areas with the highest in-migration and amenity characteristics. As of 2004, land values were below AUS\$1500/ha in eight of the 11 postcode areas, but up to AUS\$4000/ha in one (Mt Beauty), AUS\$7000/ha in another (Bright) and AUS\$12,000/ha in Dinner Plain. Bright is a small township on the access road to the Falls Creek ski resort and these higher unit values may reflect the greater availability of smaller lots in town. Dinner Plain, however, is a relatively new residential development near the Mt Hotham ski resort, with its own recently constructed airport, and the high land values reflect this: over ten times those for equivalent land in most of the Victorian Alps. Even if only larger blocks >30 ha are considered, values in Dinner Plain ranged consistently up to AUS\$7000/ha in 2003, and have grown steadily over recent years, and the minimum value per hectare in Dinner Plain is similar to the maximum in low-migration districts. Actual sales prices in Dinner Plain range up to AUS\$28 million/ha in 2004, with a median sale price of AUS\$12 million/ha (Fig. 19.2). These high figures, however, reflect the very small footprint for some of the dwellings, since much of the Dinner Plain development is

ski apartments rather than long-term residential housing. The number of individual sales in Dinner Plain was less than ten per year until 1995, around 30 per year in 1999 and 2000, and rose to 70 in 2003.

Current Property Listings

Many amenity migrants buy rural property, and they use real estate and property agents to do so. These agents pitch their marketing materials so as to interest potential buyers. If an area is experiencing significant amenity migration, therefore, we should expect local real estate and property agents to advertise property features likely to appeal to amenity migrants rather than to large-scale production farmers. Features such as roads, fences and water supplies are important to both. Advertising aimed at amenity migrants is likely to mention: the size, construction and décor of the house; convenience to shops and facilities; whether or not the access road is paved; and features such as swimming pools, lock-up garages, entertainment areas, ornamental gardens, scenic views and recreational opportunities. For practising farmers, features of greater interest include soil type, production history and agricultural improvements and equipment such as stockyards, livestock sheds and grain silos. By comparing advertisements, therefore, we could assess the extent of amenity migration as perceived by realtors in the regions concerned.

The distinction is not clear cut. Amenity migrants still want rural landscapes and still need to maintain their land. They may also keep their farm operational, either for tax advantages, for access to government assistance programmes, as a basis for tourism businesses or for personal lifestyle reasons. The terms in which property sales advertisements are couched, however, are likely to reflect a particular target market. In addition, large-scale amenity migration may often involve significant subdivision of rural properties into acreage estates and lifestyle communities, as well as individual purchases of entire farm landholdings. Such subdivisions may simply feature residential opportunities in a rural landscape, or they may incorporate specific recreational opportunities such as access to ski fields, golf courses or waterways for fishing or boating.

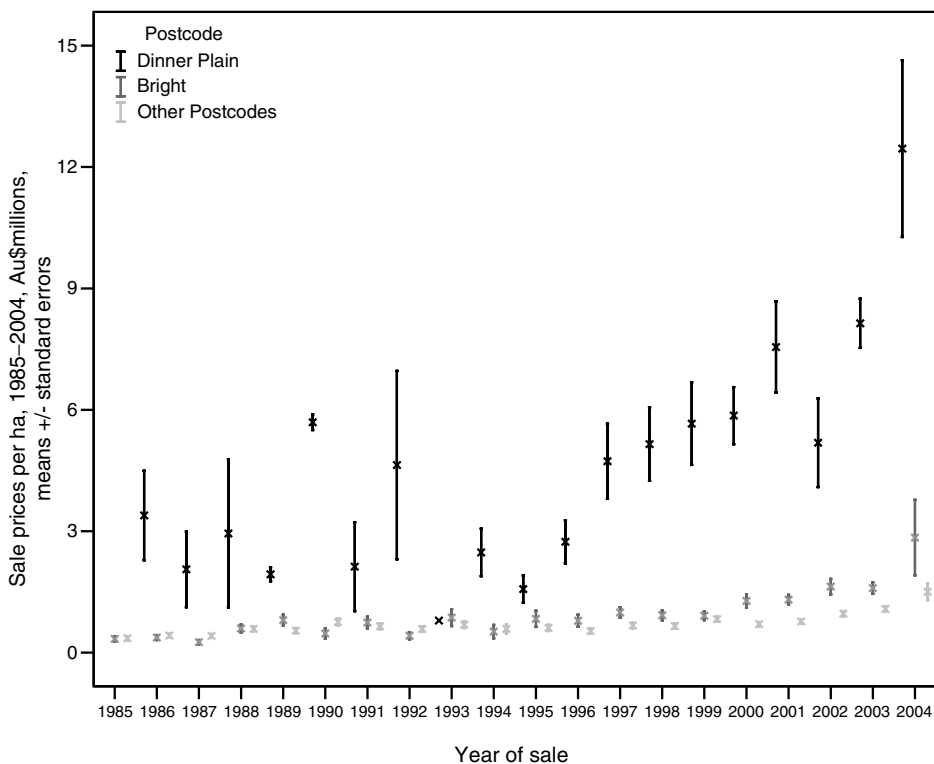


Fig. 19.2. Sale prices per ha, 1985–2004, Alpine Shire, Victorian Alps.

Where real estate agents are selling such subdivisions in formerly agricultural or pastoral areas, therefore, this provides strong evidence of amenity migration. Most real estate agents in Australia currently advertise via websites as well as window displays. In addition, Australian property buyers make heavy use of sites such as realestate.com.au, which provide linked databases of properties for sale, searchable by price, geographic areas and other features.

We were hence able to search for evidence of both new amenity migration subdivisions and existing properties marketed to potential amenity migrants, through internet searches using google.com, realestate.com.au and individual agents' sites in our four study regions. We (RB) compiled information on properties currently for sale in areas, focusing on area, price,

characteristics of house and land and marketing descriptions, as an indicator of expected buyers. This is not a complete or systematic sample, but it is up-to-the-minute and comprises data commonly used by potential amenity migrants themselves.

Note that this approach applies only for amenity migrants who want to buy rural residential properties, whether up- or down-market. Amenity migrants who buy houses in rural townships, or who rent accommodation while working for a few years in amenity areas, will not be reflected in property agents' marketing materials.

In the Victorian Alps, we focused on eight rural townships, including the recently developed area of Dinner Plain, which lies between a regional airport and a ski resort. In the Snowy Mountains, the town of Jindabyne is the key area

since the resorts themselves are enclaves within a national park. On the Atherton Tablelands, seven former logging townships, now tourism destinations, are most relevant. To restrict these searches to manageable proportions, we examined marketing materials in detail only for properties priced over AUS\$300,000. For consistency, we searched all areas on the same date, 10 January 2005. This is during the January school holiday period in Australia when many families take the opportunity to travel to tourist and amenity migration areas, so it is a good period to search for property listings targeted at amenity migrants.

In Dinner Plain, the richest area in the Victorian Alps, there were 38 properties priced AUS\$300,000–500,000, two priced over AUS\$1 million and 17 priced between AUS\$500,000 and \$1 million. Nine of those 17 were acreage properties with amenity-migrant features and eight were residential tourism businesses. There were no operating farms for sale, and there is no old township. Of the two priced over AUS\$1 million, one was a set of units on a 1.0 ha block, and the other was a single residence on a 58.3 ha property.

In Jindabyne (Fig. 19.3), the principal amenity migration area in the Snowy Mountains, there were 33 properties priced AUS\$300,000–\$500,000, three over AUS\$1 million and 33 priced between

AUS\$500,000 and AUS\$1 million. Of these last, one was advertised as an operating farm, four as large rural residential properties, 24 as houses or apartments in town, and four as tourism businesses. The farm was smaller in area than some of the rural residential properties. Of the three priced over AUS\$1 million, one was an apartment and two were large amenity-oriented rural residences.

In Stanthorpe and its immediate surrounds there was a winery for sale at over AUS\$1 million, a house and a farm priced between AUS\$ 500,000 and 1 million, and 23 properties priced from AUS\$300,000 to 500,000. Of these, seven were rural residences, 16 were houses in town and two were tourism businesses. Overall prices, therefore, are lower than in the alpine areas, but relative patterns are not dissimilar.

In the Atherton Tablelands, there was one farm priced over AUS\$1 million, 102 properties priced from AUS\$300,000–500,000 and 16 priced between AUS\$500,000 and 1 million. Of these, 12 were rural residences, two were houses in town and two were farms. There are at least half a dozen small townships in this area, so the preponderance of rural properties is a strong indicator of amenity migration in this instance.

All of the large rural residential properties enumerated above were advertised with



Fig. 19.3. Town of Jindabyne, Australia, gateway to the Snowy Mountains and ski resorts (photograph: R. Bear, March 2005).

strong amenity-related text and images, featuring comfort, luxury, lifestyle and entertainment opportunities as well as scenery, views and recreation. Only those classified as operating farms identified farm equipment, livestock, etc.

There are significant differences between Dinner Plain in the Victorian Alps and Jindabyne in the Snowy Mountains. Jindabyne is a pre-existing township surrounded by rural land which has been readily available for subdivision. Dinner Plain is a recent and much more heavily planned and regulated development.

We also examined properties for sale through one particular agent in northern New South Wales, whose name and portfolio have a strong amenity-related 'lifestyle' theme. As of 10 January 2005 we found 23 acreage residential properties listed with this agent, of which one was priced below AUS\$100,000, seven from \$100,000–250,000, 13 from \$250,000–500,000 and two were unpriced. Of these 23, three were less than 0.44 ha in area, 11 were between 0.44 and 2.2 ha, six were from 2.2 to 20 ha, and three were more than 20 ha. In this region there are also new strata-titled (condominium-style) rural subdivisions whose marketing is pitched specifically at 'alternative culture' buyers. This part of northern New South Wales was a major centre of hippy culture some decades ago, and this has now gone mainstream.

Even in the alpine areas, prices are much lower than for absolute beachfront in coastal locations. A small beachfront building block on Queensland's Gold Coast, for example, recently sold for over AUS\$20 million, and a beachfront house on Belongil Beach in Byron Bay, northern NSW was listed at AUS\$9 million. Beachfront in the major capital cities of Sydney and Melbourne is priced even higher.

Farm Tourism and Amenity Migration

The structure of the (federal) income tax system and (state) land tax systems in Australia provide strong financial incentives for rural landholders to maintain the primary production classification for their land. For landholders who are amenity migrants and want to maintain the scenic and amenity value of their land, but still want to be

able to deduct property maintenance costs from income for tax purposes, one of the best options is to operate a tourism business on the same property. Many farm tourism enterprises may hence be established by amenity migrants. In addition, many amenity migrants are older people, who may need an income to live on (and pay taxes!) during retirement. Other farm tourism enterprises, however, are established by long-term farmers who have found that their properties are no longer economically viable solely for agricultural commodity production. Reasons may be national or global, such as droughts or falling commodity prices; or local and internal, such as family factors. In either case, farmers need additional income in order to stay on the farm, and tourism provides one option. Hence most farm tourism enterprises in Australia seem to be either: (i) long-term farmers needing extra cash income to keep farms in the family, or (ii) amenity migrants needing tax advantages or retirement income from rural residential landholdings.

As part of a broader study of farm tourism in Australia (Ollenburg, in prep.), we compiled a database of all Australian rural landholders who operate both a working farm and a farm-based tourism business on their property (Ollenburg and Buckley, in review). There are over 600 such farm tourism enterprises nationwide. In October 2004, we (Claudia Ollenburg and Ralf Buckley) sent a mail questionnaire to each of these, seeking information on various aspects of the landholding, the farming business, the tourism business, ownership structures, family issues and attitudes and motivations (Ollenburg, in prep.) Of the 174 responses received by December 2004, 67 are from families who have lived on the same farm for two to six generations, but 107 are first-generation residents who bought the land themselves, and in most cases started the tourism businesses from scratch. In November 2004 we (Claudia Ollenburg and Ralph Buckley) commenced on-site case study visits and interviews, and these indicate that many of these landholders are indeed relatively recent amenity migrants.

The mail questionnaires were not designed to analyse amenity migration, but the data set can be used to examine a number of relevant patterns. The main approach is to compare first- and older-generation landholders. First-generation landhold-

ers are not necessarily amenity migrants, but amenity migrants are necessarily first-generation landholders. Thus, the first-generation properties include both amenity migrants and production farmers, whereas second-generation and above are all production farmers. Relevant differences between the two, if statistically significant, can hence serve as indicators of amenity migration.

In fact, we found that first-generation farm tourism operators tend to be older on average than operators who had owned their land for at least two generations ($P < 0.05$). Their properties tend to be smaller ($P < 0.05$), albeit with high variability in area for both groups. They devote twice as much of their land to non-farm uses, 25% cf. 13% ($P < 0.005$). More of them have at least part of their land under some form of voluntary conservation agreement, 13% cf. 9%, though this difference is not statistically significant.

More of the first-generation landholdings are within 2 h of a major airport ($P < 0.01$). Interestingly, 40% of first-generation properties list themselves as 'minority' farm types such as horse or alpaca studs, whereas all but 8% of older farms are in 'mainstream' beef, dairy, sheep or crop production. Of course, this could indicate a higher commercial failure rate in non-mainstream farming, rather than necessarily a preponderance of amenity migrants. Reflecting a similar pattern, only 73% of first-generation farm tourism properties are classified as primary producers, whereas all but 3% of longer-term properties are ($P < 0.001$).

Also of particular interest, 74% of first-generation owners had a previous career outside agriculture, compared to only 39% of owners in inherited properties ($P < 0.001$). This may reflect amenity migrants who have moved to the country to dabble in farm lifestyles rather than to make a career income from agricultural commodity production.

Attitudes and motivations associated with operating farm tourism businesses were generally similar for the two groups, but there are two interesting differences. Landholders who were already second-generation or higher placed higher priority on keeping the property in the family ($P < 0.0001$). First-generation landholders, however, were more likely to specify retirement income as a reason for starting a farm tourism enterprise ($P < 0.001$).

Taken together, therefore, the patterns summarized above generally support the suggestion that many first-generation farm tourism operators are indeed amenity migrants.

The geographic distribution of these properties is widespread (Ollenburg and Buckley, in review), but they are concentrated in scenic areas in the immediate hinterland of coastal tourism destinations, and the tablelands and eastern scarps of the Great Divide, the main mountainous spine running north-south behind Australia's eastern coastline. These are all areas appropriate for amenity migration, and include the regions used for analysis of census, land price and property marketing data as above.

In addition there are numerous first-generation farm tourism properties in the south-west of Western Australia, also a noted amenity migration area. In Tasmania and Victoria, where almost all the state is attractive to amenity migrants, there are three times as many first-generation as older-generation farm tourism landholders (34 cf. 11). In Western Australia there are twice as many (23 cf. 11), concentrated in the south-west. In Queensland, which includes several high-amenity areas but also large central and western agricultural areas with low amenity, there are 1.5 times as many first- as older-generation landholders (17 cf. 12). In New South Wales and South Australia, which have relatively narrow subcoastal strips of high amenity and broad dry inland areas, there are about equal numbers (30 cf. 31, in total). The difference between Victoria, Tasmania, Western Australia and Queensland on the one hand, and NSW, South Australia and Northern Tasmania on the other, is significant at $P < 0.05$.

Conclusions

Analyses of census data demonstrate that people with the demographic characteristics of amenity migrants did indeed migrate to specific areas of high natural amenity between 1996 and 2001. Whilst statistically significant for all four regions examined, these patterns were much stronger for the southern mountain areas near ski resorts than for the tropical and subtropical inland areas. Land values and sales prices show a similar pattern, as does real estate and property agent

marketing. In addition, it appears that about half of all first-generation rural landholders who operate farm tourism businesses are amenity migrants rather than production farmers.

Using these various sources, we can conclude quite clearly that amenity migration has definitely occurred, and is continuing, to areas near the resorts and parks of the Australian Alps. Patterns are slightly different in NSW and Victoria because of different land tenure patterns and histories, planning controls and infrastructure. In both cases, however, wealthy people are buying residential properties in both townships and rural agricultural areas. People are also moving to these areas to work in both the property and tourism sectors. Many of these have university degrees. These patterns are not dissimilar to those in the New West of North America (Power and Barrett, 2001; Johnson *et al.*, 2003; Johnson, 2004).

Amenity migration is also occurring, but in a much more diffuse and low-key way, to other areas inland of the eastern coastline. Quantitative results presented here focus principally on the Atherton region inland from Cairns, and the Stanthorpe region on the inland border of Queensland and New South Wales, but observations indicate that similar patterns are occurring in many other parts of both these states. Again, there are at least two groups of amenity migrants. There are relatively wealthy individuals who are buying rural properties for semi-retirement, and there are less wealthy people who move to country townships or rural land for a variety of personal lifestyle reasons.

The patterns outlined above focus only on the Great Divide, the mountain spine of eastern mainland Australia. Our observations, as well as the farm-tourism and property-marketing data sets, indicate that there are very similar phenomena in Tasmania and in south-western Western Australia, though we did not include these areas in our analyses of census data and property values. Future research, however, should also include those areas.

Overall, it appears that inland amenity migration patterns in Australia are similar now of those in the USA about 15 years ago. To obtain more detailed information on amenity migration

processes, there are several avenues for further research. We could examine recent development infrastructure in relevant areas. We could analyse planning applications and approvals. We could obtain information from individual residents by mail survey or interview. And we could obtain expert stakeholder opinions by interviewing local and state government planners and local chambers of commerce, property agents and community groups.

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20 Amenity Migration in the South Island of New Zealand: Contestation for Land and Landscape in Central Otago

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Migration has been a major point of policy contention and debate in New Zealand since the mid-1990s. With respect to international immigration there has been a substantial debate over how many migrants should be allowed entry into New Zealand as well as their ethnic mix and skill levels (Walker, 1995; Bedford, 1999; Pool, 1999; Bedford *et al.*, 2001). In terms of emigration there have been concerns expressed about 'brain drain' and the extent to which New Zealand citizens and permanent residents who leave the country then return in the future (Bedford, 1999, 2001). Debates over international migration are reflected in regional concerns over population movement. Indeed, regional population change is also implicated in international migration and human mobility. At the regional level, the debates also reflect broader international concerns as to the decline of population in rural and peripheral regions and the extent to which such locations could be made more attractive, and the relative stronger growth of large urban centres, particularly Auckland, in relation to other areas. Some of these regional issues have become incorporated into a larger debate about the population of New Zealand. However, while issues of race and ethnicity as well as potential population loss have been discussed, a number of significant areas remain. Pool (2002) has described some of these concerns, which have generally lain within the academic and policy communities as latent

issues that are having observable affects but receive little attention in wider public discourse. According to Pool (2002), two latent issues stand out: first, changing age, cohort and labour force structures; second, counter-flowing redistribution trends, notably shifts towards rural areas for a variety of social rather than economic reasons. Both issues potentially have implications for amenity migration.

Despite the fluidity of human movement in New Zealand some regions have managed to experience growth, and here a new set of policy issues have emerged with respect to landscape protection, the provision of goods and services and the potential social and economic stress on existing communities. Significantly, for the purposes of the present volume, those regions that have experienced population growth are regarded as locations for 'lifestyle' or 'amenity' migration due to the attractiveness of their environment as well as their relative accessibility.

The present chapter examines amenity migration with respect to the southern alpine area of the South Island of New Zealand, the Central Otago region. The altitude here ranges from just over 200 m in the lower river valleys to over 3000 m in the Southern Alps, which act as the western topographical boundary of the region. Mt Aspiring at 3030 m is the highest peak in this section of the Southern Alps mountain system. To the south-west of the Central Otago

region is the Lammarlaw Range, whose highest peak is Lammerlaw Top at 1211 m.

Before focusing on alpine migration in the island and the forces that have shaped such migration patterns, the chapter provides a brief outline of broader migration patterns as well as the difficulties in undertaking research on internal migration in New Zealand. Emphasis is placed on the role of tourism and second homes as major elements in amenity migration because of their relationship to more permanent lifestyle and retirement migration. The Queenstown and Cromwell districts are used as primary case studies along with other locations. Key considerations include the demands being placed on local resources, access issues and potential conflicts between amenity migrants and other land uses including viticulture and extensive farming, which give the landscape some of its different features which attract migrants. In addition, another key source of conflict is the rising cost of housing in the region, which is causing considerable debate among existing residents in some locations. The chapter concludes by noting the importance of adopting growth management strategies that consider wider aspects of human mobility than at present, as well as an improved statistical and research regime that can capture the dynamics of amenity migration.

Analysing Migration in New Zealand

Migration may be measured in several ways, but the two most common forms of data measure changes of residence, either as transitions or as events (Bell, 2001, 2002). Transition data are typical of the information collected at a census, such as that used in New Zealand, which compares place of usual residence at the time of enumeration with that at some earlier date. Such an approach has a number of limitations, the most serious of which are the failure to identify multiple and return moves, and migrants who are born or die within the transition interval (Bell, 2002). Event data, on the other hand, aims to capture every move made by each individual during a given time period, including multiple moves and births and deaths during the measurement period. Such an approach is typified by the type of population

registers used in Scandinavia (see Müller, Chapter 17, this volume).

At the national and regional level, two major sources of migration data exist. International migration events are recorded in the departure and arrival statistics collected at the border, with international airport gateways being the most likely location for sites. The departure and arrival cards collect information on destination for departures, origin and broad international destination for arrivals and age and sex but not on ethnic origin of immigrants. The New Zealand Census of Population and Dwellings held every 5 years is the second major source of migration data, particularly for domestic migration. The New Zealand census measures migration as a transition between two fixed points in time. It does not collect the data on place of birth for the native-born, needed to measure lifetime movement, as do the US and Canadian censuses. Both countries also conduct periodic surveys that report other aspects of mobility, such as frequency of movement and duration of residence. The census provides information on migration events through a question of years at usual address, and provides transition data through questions on current usual address, location a year ago and address 5 years ago. The census allows internal migration transitions, interpreted as changes of long-term or permanent place of residence, to be measured directly. Regions are an important level of analysis, but their different sizes change the balance between interregional and intraregional migratory movements in arbitrary ways (Newell, 2002). Another major limit in the New Zealand census and migration data is the difficulty in assessing temporary migration and circulation (Bell, 2001), particularly with respect to second homes (Keen and Hall, 2004). Since the 1996 New Zealand census, data on unoccupied dwellings have been inseparable from that on unoccupied holiday homes. Nevertheless, research by Keen and Hall (2004) suggests that a number of districts with high natural amenity values have large numbers of second homes, which may serve as indicators to longer-term amenity migration, often related to retirement migration.

It is extremely difficult to analyse and interpret sub-national migration trends in New Zealand because of the nature of migration data,

particularly to distinguish between different motivations for migration such as labour market/employment, education, retirement and amenity/lifestyle decisions (Newell, 2002). Therefore, there is substantial reliance on micro-level studies, undertaken through a variety of quantitative and qualitative techniques to assess regional migration issues and their relationship to migration motivations (e.g. Waldegrave and Stuart, 1997; Scott and Kearns, 2000; Fountain and Hall, 2002 (Table 20.1).

Amenity Migration in New Zealand

New Zealand has the highest rate of migration mobility in the developed world (Long, 1991). As with other developed countries, New Zealand has experienced very significant shifts in the geographical distribution of its population in recent years. These shifts have been related to broader restructuring issues within the New Zealand economy, which have affected both manufacturing and agriculture, but which have hit the rural economy the hardest with substantial impacts on small rural service centres and rural communi-

ties. Such effects have been exacerbated by the corporatization and privatization of many government services as well as new sets of policies with respect to the provision of social, education, health and welfare services (Le Heron and Pawson, 1996). The geographic inertia is towards the north, towards Auckland as the largest urban area and towards retirement zones, which have become zones of broader population growth (Goodwin and Bedford, 1997; Bedford *et al.*, 1999; Pool, 2002). Rural-to-urban migration, from farm to city, has virtually ended, with few more people left in farming areas to migrate. Nevertheless, urbanization, retirement and lifestyle migrations are all making an impact on rural and peripheral areas.

The movement of people from the cities to rural areas in New Zealand has often been associated with international processes of counter urbanization in the development world (Champion, 1989, 1998; Sant and Simons, 1993; Boyle and Halfacree, 1998). In Australia, this has been primarily associated with migration to adjacent peri-urban areas and the coast (Hugo and Smailes, 1992), including substantial movements to attractive coastal towns and villages well beyond daily

Table 20.1. Net internal migration by age for New Zealand regions 1996–2001.¹

Region	Age group (years)					Total
	5–14	15–24	25–44	45–64	65+	
Northland	363	-3294	567	1404	384	-576
Auckland	-2445	7479	717	-4581	-3411	-2244
Waikato	834	-1302	522	966	477	1494
Bay of Plenty	2034	-2313	3879	3222	1842	8664
Gisborne	-459	-1203	-585	-333	-75	-2655
Hawke's Bay	153	-2562	63	78	204	-2064
Taranaki	-174	-2340	-747	-450	93	-3618
Manawatu-Wanganui	-882	-1134	-4260	-246	414	-6108
Wellington	-909	3945	1761	-1836	-663	2298
Tasman	693	-438	1353	690	261	2562
Nelson	222	-207	84	-15	27	108
Marlborough	117	-624	162	717	210	585
West Coast	-399	-930	-579	-201	-45	-2157
Canterbury	1620	3354	1974	1398	435	8778
Otago	-54	4095	-3240	294	48	1146
Southland	-573	-2394	-1308	-996	-141	-5409

Source: Statistics New Zealand (2001 Census).

¹Based on census usually resident population count at the 2001 Census of Population and Dwellings held 6 March 2001.

commuting range (Sant and Simons, 1993; Bell, 2002). In contrast, in North America counter-urbanization movements have also been associated with mountain and inland areas, particularly in the American West. Research in the western USA suggests that quality of life factors are major determinants of population change and employment growth (von Reichart and Rudzitis, 1992, 1994; Beyers and Nelson, 2000; Shumway and Otterstrom, 2001), with jobs following people, rather than people following jobs (Vas, 1999). Indeed, access to high amenity values are now recognized as a major driving force behind rural development (Galston and Baehler, 1995; Nord and Cromartie, 1997; McGranahan, 1999; Cromartie, 2001; Deller *et al.*, 2001; Hall, 2005).

Amenity values include such items as an attractive rural environment, recreational and leisure opportunities, cultural richness, reasonable costs of living, safe communities, good transport and communications access to major urban centres and quality public services. Such amenities attract retirees, second-home (holiday home) owners and tourists, thereby creating demands for additional services and labour (Williams and Hall, 2002). Nevertheless, despite recognition by government of the potential economic, social and environmental significance of amenity migration in New Zealand (e.g. Parliamentary Commissioner for the Environment, 2001), research on such migration is relatively sparse in comparison with North American and European studies (Fountain and Hall, 2002; Keen and Hall, 2004).

In recent years, New Zealand has been subject to several different streams of amenity migration. In the North Island there has been substantial amenity migration, often associated with domestic retirement, to the northern coastal areas, particularly around the Bay of Plenty and to a lesser extent, to Coromandel and the Bay of Islands (Northland). This has been partly matched by some coastal amenity migration in both islands, which has featured significant numbers of return migrants and overseas investment. In the South Island, this has been concentrated at the northern part of the island in the regions of Tasman, Nelson and Marlborough as well as in the Banks Peninsula near Christchurch (Canterbury) (Fountain and Hall, 2002). A third migration pattern has been connected to alpine and high-country amenity migration in the South Island of New Zealand, which has consisted of both domes-

tic and international migration influences and which has recently become the focus of significant controversy over land use, growth management and regional identity. In part, such movements are reflected in the net internal migration for New Zealand regions from the 2001 census, particularly with respect to retirement migration. Indeed, Statistics New Zealand (2000) have noted the significance of core amenities, climate and environment for retirement migration, although they also observed that 'While this has positive economic outcomes for smaller centres, continuation of these patterns would lead to increasing demand for recreational and health services in these areas' (2000: 9). Such concerns over retirement migration as well as pressure on natural and built amenities have surfaced in the alpine areas of the South Island of New Zealand and it is to a short case study of this region that we will now turn.

Changes in Paradise? Amenity Migration Pressures on the Central Otago Region

In late January 2004, the *Otago Daily Times* featured a front page article on the pressures on the Central Otago region as a result of migration pressure (Manning, 2004). Headed 'Changes in Paradise' the article returned to an earlier theme of the Parliamentary Commissioner for the Environment's (PCE) (2001) review of sustainable development in peri-urban areas, which included a study of the Wakatipu Basin, Queenstown in Central Otago, entitled 'Managing Change in Paradise'. The PCE used the term peri-urban to describe areas that are in some form of transition from strictly rural to urban (2001: v). The reason why the term paradise was used in either case was never explained. Undoubtedly, in part, it reflects a healthy parochialism regarding the quality of life in 'God's own country' as many New Zealanders would say. However, more likely it reflects something of the value attached to certain landscapes, illustrated in part by their substantial use for holiday and recreational purposes and, more recently, by their attraction to increased permanent settlement, with a concern that 'makes it more critical that we get the management right and do not lose the attributes that attract people to these areas in the first place' (PCE, 2001: 2).

Indeed, in the case of Central Otago, the potential change is regarded as potentially dramatic (Fig. 20.1):

Postretirement lifestyle settlement is bringing more than people to Central Otago and the Queenstown and Wanaka lakes districts; with them comes change more dramatic than that which accompanies gold mining, the introduction of the railways and, more recently, the large hydro-electricity dams and works (Manning, 2004: 1).

The reference to gold, railways and hydro-electricity in the above quote from Manning is significant as, in a similar fashion to other peripheral mountain regions, the region has gone through a number of boom and bust periods with respect to economic development and therefore fluctuating levels of population. Indeed, much of the landscape of the hills and valleys in the region has been substantially altered through human intervention as a result of gold sluicing, hydro-electric dam construction and sheep grazing. In the case of the Central Otago, the importance of access for tourism and second-home development has been recognized for a number of years (Kearsley, 1990, 1992; Hall and Kearsley, 2001).

Many settlements, such as Queenstown, Wanaka, Cromwell, Arrowtown and Naseby, began as goldfields settlements following the dis-

coveries of 1861. However, many of them were not able to develop a significant agricultural service function after gold declined, and so they became early sites for 'crib' (second home) development or venues for camping holidays (Pearce and Cant, 1981). Still others were abandoned and became virtual ghost towns that have only recently been rediscovered as tourist products. Early access to the inland resorts was by train or, later, by motor bus, from coastal centres such as Dunedin, Invercargill and Timaru, and so tourism, which soon established itself as a significant means of economic development, tended to be concentrated in a limited number of accessible places. The advent of mass car ownership was to bring in substantially different patterns of development, but second homes remain the primary form of permanent accommodation in virtually all resorts, where they form a significant element of casual rental accommodation. Importantly, this also meant that many of the rural centres in the region have long been locations for permanent or temporary retirement migration (Kearsley, 1992). However, the rapid development of tourism in the region from the 1950s on, with the development of ski resorts and increased road and air accessibility, also led to the attraction of permanent and seasonal labour, which also contributed to increased urbanization (Hall and Kearsley, 2001).



Fig. 20.1. Central Otago, New Zealand, amenity landscape showing gradual conversion from orchards to lifestyle blocks and vineyards (photograph: C.M. Hall).

Recent retirement and second-home migration to Central Otago is therefore a continuation of historical trends. Yet the scale of such migration is greater than ever, with substantial growth predicted for the future (Tables 20.2 and 20.3). However, the figures utilized by local government regarding population growth are extremely deceiving as to the real number of people being located in the region at any given time, simply because the region is characterized by enormous amounts of temporary mobility in the form of tourism, seasonal labour and second homes. Table 20.4 shows the percentage of unoccupied dwellings for the main urban centres in the region, which indicates substantial potential occupation rates during periods of peak demand. Just as importantly, qualitative research (Keen and Hall, 2004) suggests that many of the properties purchased as second homes will become converted into retirement homes or late-career-move homes, particularly given the employment opportunities being provided by the growth being experienced in the region. As Flaherty (2004: 1) commented, 'The new retirees have not moved to die. They are counting on a golden 30 years of golf, walking, squash and swimming in the landscapes they probably knew and loved as children and are now helping change in ways their grandchildren may not thank them for.'

The impacts of such migration and its flow-on effects are varied. In social terms, an immediate issue has come to be the availability of housing and land for development and competi-

tion for housing between permanent and seasonal residents because of the increased costs of housing. Even though Queenstown has been warned, it has to learn from the mistakes made by too many overseas resorts whose local workers have to live miles away from the resort in some obscure valley or small town. The solution has been seen in the provision of even greater urbanization through the provision of affordable housing (New Zealand Herald, 2004a). Indeed, one problem that has emerged is that some developers that have received permission to build affordable seasonal housing in residentially zoned areas, then seek to have development consent conditions changed in order to use some housing for tourists (New Zealand Herald, 2004b).

Urbanization and housing growth also has substantial implications for the provision of services and infrastructure and consequent fiscal stress that may be placed on local (territorial authorities) and regional councils. In New Zealand, there are currently 16 regional councils and 74 territorial authorities (six are combined). Both regional councils and territorial authorities have the power to levy rates. The main functions of the regional councils include responsibilities under the *Resource Management Act*, control of pests and weeds, marine pollution control, regional civil defence and transport planning. Territorial authorities generally have responsibility for noise and litter control, parks and reserves, roads, sewerage, water supply and building consents. However, consents for housing development and subdivision are inti-

Table 20.2. Central Otago Lakes District population.

Year	Queenstown Lakes District Council		Central Otago District Council Population ('000)	Total ('000)
	Population ('000)	Percentage of region total		
1936	3.8	24	12.2	16.0
1956	3.5	18	16.3	19.8
1976	4.8	26	13.7	18.5
1986	9.9	37	16.6	26.5
1996	14.3	49	15.0	29.3
2001*	17.8	55	14.3	32.6
2003*	20.7	58	15.0	37.5
2021*	29.2	71	12.1	41.3

*Estimated figures Statistics New Zealand.

Table 20.3. Percentage of Otago region's population living in Queenstown, Wanaka, Alexandra and Cromwell.

Year	Percentage
1926	2
1956	3
2001	15
2021*	25

*Estimated figures Statistics New Zealand.

mately related to the provision of services and infrastructure as an extremely high proportion of council revenue comes from land taxes that will rise or fall depending, in part, on the value of land and the improvements on it. New Zealand probably depends on land taxes more than anywhere else in the world. In 1998, 56% of local government revenue came from property tax revenue (McCluskey, 1999; McCluskey and Franzsen, 2001). Therefore, there is the potential for councils in rapidly growing areas to be caught in a vicious cycle of growth and taxation in meeting infrastructure and service demands (Ansley, 2003). In the case of Central Otago, and particularly the Wakatipu Basin near Queenstown (PCE, 2001), this has raised substantial questions regarding residential subdivision and its effect on the amenity landscapes that attracted people to move there in the first place (Chamberlain, 2001). Indeed, controversy over development strategies

has even spilled over into mayoral and council elections.

The Wakatipu Basin has been an area of pastoral farming for most of the last century, but now farming cannot compete with returns from subdivision development. According to the PCE (2001: 26), 'The visual landscape is the key to attracting this development but is also potentially under threat from it. The tension between the drive for development and the desire to sustain landscape values creates an intense political environment.' Between October 1998 and May 2001 the Queenstown Lakes District Council (QLDC) approved 799 new rural allotments, of which approximately 60% (480) were within the Wakatipu Basin. Significantly, for future development not all of these new allotments have been created and it will be some time before they are built on. Indeed, some may never be created or built on. In addition, QLDC zoned approximately 1260 ha in the Wakatipu Basin for rural living purposes, to provide for up to 1655 new lots as a controlled activity (PCE, 2001). According to the PCE (2001: 27), 'This development would result in significant cumulative changes to the landscape and pose significant challenges in terms of funding and developing appropriate infrastructure for the Basin'.

Concerns over the protection of the landscape have also become combined with other debates over landscape change, foreign investment, and recreational access. In the case of the Central Otago region, a major factor in landscape change

Table 20.4. Minor urban areas in Central Otago by unoccupied dwellings, 2001 (areas above minor area average for total unoccupied dwellings).

	Total occupied dwellings	Residents away	Empty dwellings	Total unoccupied dwellings
South Island				
Twizel Community	459	21 (2.2%)	468 (49.4%)	489 (51.6%)
Cromwell	1,113	96 (6.7%)	228 (15.8%)	327 (22.7%)
Wanaka	1,446	165 (6.4%)	957 (37.3%)	1,119 (43.6%)
Arrowtown	690	126 (12.2%)	216 (20.9%)	342 (33.1%)
Queenstown	3,480	708 (15.3%)	453 (9.8%)	1,161 (25.0%)
Total, minor urban area				
New Zealand ($n = 99$)	122,469	7,716 (5.3%)	15,312 (10.5%)	23,025 (15.8%)

Source: Derived from New Zealand census 2001 figures in Keen and Hall (2004).

has been the development of vineyards. In 1994, there were 100 ha in vineyards. By 2002, this had grown to 1100 ha with growth showing no sign of slowing. The implications of such growth are significant not only for the landscape but also because the new grape landscape is arguably contributing to further amenity migration (Hall and Mitchell, 2002). Nevertheless, there is a regional (Moldofsky, 2001; Carey, 2003), as well as a national, climate of concern over access to mountain and coastal landscapes as indicated by the activities of conservation groups (Gibson, 2004), as well as reports by government agencies (PCE, 2001). For example, an environmental lobby group, the Environmental Defence Society, has attacked various councils which it criticizes for not guarding areas of natural heritage and allowing 'inappropriate subdivision and development' leading to the 'degrading' of 'our special places', including the Wakatipu Basin between Queenstown and Arrowtown (Gibson, 2004). Arguably, much of the concern over access has occurred because of the overall rise in real estate prices in New Zealand in 2003 and 2004 and the high-profile purchase of coastal and mountain properties by overseas buyers. Nevertheless, the 2004 purchase of Motatapu and Mt Soho hill stations (25,000 ha) by Shania Twain and her husband for NZ\$21.5 million may show the potential for the creation of win-win situations. In exchange for being allowed to buy the two stations, New Zealand has been presented with a 27 km route that will become a walkway. This effectively gives the country a new conservation estate of 13,000 ha. However, the amount of 'iconic' land owned by foreigners is unknown. The government estimate that 123,000 ha of high-country land in the Southern Alps is owned by foreigners, whereas the Forest and Bird Society believe that it is twice that much (Ansley, 2004). Regardless, it is readily apparent that the impact of amenity migration on high-value mountain environments will remain a contentious issue in the foreseeable future.

Managing Change in Paradise

As the discussion above has indicated, amenity migration is a continuation of historic trends, although what is new is the sheer scale of such migration. One local commentator stated that 'there is a redistribution of people, herds of the

wealthy seeking new and more beautiful areas in which to graze' (Flaherty, 2004: 1). Arguably this is an overstatement and fails to acknowledge the significance of the ageing of the New Zealand population as well as its increased mobility. Moreover, it also ignores the substantial influence of second-home development on migration patterns, something also ignored in much debate over the issue of the impacts of amenity migration in high-value landscapes (PCE, 2001). Nevertheless, there are also substantial issues over the extent to which amenity migration and its impacts can actually be controlled given the desire of rural areas to maintain economic and population growth. Indeed, a comment that can be made about much of the development issues in Central Otago is that many of the longer-term inhabitants have little substantial problems with the current growth as they typically refer to those times in which the region was beset with population loss, decline of services and infrastructure and a lack of employment opportunities. There is sometimes misgivings about the increase in property values, although that also tends to come from those who rent as opposed to those who own their properties. Many of those who oppose the growth strategies are actually more recent migrants who moved because of the amenity values and people with second homes for whom the area has a recreational as opposed to economic focus (Fountain and Hall, 2002 record a similar situation with respect to Banks Peninsula). This is not to say that amenity migration-induced landscape change is insignificant; however, it is important to note that the aesthetic impacts need to be seen in a wider social and economic context.

The PCE (2001: 30) identified two major recommendations with respect to the Queenstown region, noting that:

- It is questionable whether a council as small as QLDC has or could have the resources and capacity to implement the RMA to deal with the intense and complex issues without assistance from a national and/or regional level. This same issue will affect the implementation of the new discretionary regime provisions. It is also unclear whether there are additional resources available to monitor change to the extent required to implement the new provisions.
- The Queenstown situation seems to lack some of the checks and balances found in other regions.

Methods of providing for objective and impartial decision making, such as the use of independent commissioners, do not seem to have been used. The local community (in the form of the Wakatipu Environment Society) and the Environment Court are providing the only checks in the system. In other regions, for example, the regional council is involved in the debate and therefore party to the resolution.

However, such recommendations, while valuable, still place the development process within the domain of local land use politics, which is often dominated by growth coalitions (Hall, 2005). Leigh Hopper, managing director of Hopper Developments, one of the companies associated with subdivision in high-value amenity landscapes, argued that if government wanted to limit development then it had to target population growth (Gibson, 2004). Undoubtedly, a clear population policy for New Zealand would have value; however, population growth at the national level has relatively little impact on

amenity migration at the regional level. Instead, issues of an ageing population, landscape tastes, second-home development and transport access are far more important. In particular, the history of amenity migration in the Central Otago region is intimately related to improved access; reduce access and the relative attractiveness of some locations will undoubtedly diminish. In addition, it is important to recognize that, in the New Zealand context, the pattern of amenity migration is also greatly influenced by the location of second homes and temporary leisure mobility, including where people take their holidays. Unfortunately, while these factors are important, there is little research conducted on these areas or funding for such research. In the foreseeable future it is therefore highly likely that any clear plan to manage change in paradise will remain substantially lost and will continue to be a piecemeal, individual and incremental response to specific situations as opposed to a comprehensive strategy to conserve the amenity landscapes of New Zealand.

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Part V

The Future

In the last part and last chapter of this volume, Laurence Moss focuses on the future of amenity-led migration. He outlines its emerging pattern and likely near and longer-term key characteristics and implications for the environmental and cultural amenities of mountain areas. He then proposes strategic means for combating amenity migration's detrimental effects while at the same time realizing its benefits. It will not be an easy task, but an essential one.

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21 Next Steps and the Longer View

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This chapter focuses on the future of mountain amenity migration, along with economic migrants who follow the amenity-seeking migrants and tourists—the ‘amenity-led’. It outlines the emerging pattern and proposes strategic means for combating this migration’s detrimental effects while realizing its benefits. In formulating these proposals, I have drawn upon the suggestions and recommendations of the authors in this volume. The authors make additional proposals in their individual discourses, usually focused on the particular situation being written about; however, they are often by intent or inference applicable to the larger amenity migration condition. The proposals below are general, but can act as strategic guidelines for specific conditions. The varying understanding of ‘amenity migration’, as seen in this volume, should be taken into account, and that my remarks and recommendations do not emerge from a large fund of empirical research. Nevertheless, time is passing and strategy and action to control mountain amenity migration is already past due.

The Emerging Amenity Migration Pattern

Amenity migration in mountain regions is exhibiting some general patterning. Two configurations are most recognizable; one is predominant in the mountains, and the other more integrates moun-

tains and the cities located in their periphery. The former may be generally characterized as the rapid growth of low-density, mainly small towns along with the spread of human settlement on to surrounding alpine valleys and slopes, through a process generally resembling the kind of urban growth that occurred earlier in the lowlands. Concurrently, there is a shift in socio-cultural traits to those more characteristic of metropolitan areas. This pattern is occurring despite both the constraints and vulnerabilities of alpine biosphere and culture, and appears most pronounced in the western USA. Characteristics of this patterning are also evident elsewhere, for example, second and permanent home ownership in mountain areas of Argentina, Australia, Canada, Philippines, South Africa and in parts of Western Europe (Paniagua, 2002; Hall and Müller, 2004; Hoogendoorn and Visser, 2004; Buckley *et al.*, Chapter 19; Glorioso, Chapter 18; Folgnfeldt, Chapter 16; Moore *et al.*, Chapter 9; Otero *et al.*, Chapter 14; Perlik, Chapter 15; Robinson and Stark, Chapter 8, this volume).

A preliminary profile of this unfolding pattern is offered in Table 21.1. In it, change is classified into four developmental phases: (i) emerging; (ii) developing; (iii) mature; and then (iv) self-sustaining or declining. Among them, the last, a bifurcation, is the most speculative, as it is based on the least information. This schematic also includes key characteristics of each phase, using four categories:



Fig. 21.1. The town of Fernie (pop. 5000) in the Elk Valley, BC, Canada, an emerging four season high amenity centre (photograph: S. Short, rockiesimages.com, April 2003).

(i) socio-cultural; (ii) economic; (iii) political; and (iv) land use patterns and environmental. The last column includes examples of each phase, drawing especially upon the amenity migration experience described in this volume.

The greatest shortcoming of this abstraction is the limited information available to draw upon and its attempt to bridge international, national and local scales. By comparison, a similar schematic representing rural development in the mountain state of Colorado, USA (Aspen Institute, 1996) was based on more information and a much smaller and socio-economically homogenous area. This abstraction may also incorrectly suggest to some that all places will experience these linear, temporal phases, although, depending on place-specific circumstances, key characteristics of one phase may occur in earlier or later ones, or not at all. In addition, the definition of the place being characterized can be variable. For example, Whistler, BC is categorized as ‘mature’ (with some characteristics of entering a ‘self-sustaining’ phase) when considering the municipality *per se*, which Moore *et al.* focus on (Chapter 9, this volume). If, however, the larger amenities-led regional growth-impacted area is considered (Fig. 9.3, this volume), it is still in a

‘developing’ phase. Nevertheless, this global profile still seems useful at this stage of amenity migration analysis.

The other part of the emerging pattern is less developed than the one outlined above, or perhaps only less investigated. It is most clearly exhibited in the European Alps, where mountain amenity seekers typically reside in medium-sized superior-quality cities at the periphery of the mountains, with convenient access up to Alpine environmental amenities (Perlik, Chapter 15, this volume). This pattern appears evident elsewhere in Europe; see especially Bartoš *et al.* (2005) and Flognfeldt, (Chapter 16, this volume) for the Czech and Norwegian situations, respectively. In parts of eastern Canada and the USA, mountain amenities also exist close to large urban agglomerations, and intermittent, seasonal and permanent mountain amenity migration is taking place, along with the non-migrant travel that is characteristic of the European Alps. Glass (Chapter 12, this volume) identified this condition in the Adirondack Mountains of New York State, and Culbertson and his colleagues (Culbertson *et al.*, 2004) portray a similar situation in the southern Appalachians.

Table 21.1. Contemporary mountain amenity migration key characteristics.

	Characteristic phases				
	Socio-cultural	Economic	Political	Land use pattern and environmental	Examples
Emerging	Local population may welcome the few AMs bringing new jobs and socio-cultural activities. Cost of living relatively low except some goods (especially imported) and services.	Natural resource extraction mixed with tourism and limited new activity from young or retiree AMs with ideas and some capital. Small to moderate job increase and income gains.	Local leaders usually unclear about what is occurring. Some locals and AMs concerned about potential negative effects. <i>Laissez faire</i> , 'growth is good' predominates.	Relatively pristine environment. Large open spaces and rural communities. Farmers, etc. begin selling land to few speculators and AMs.	Bulkley Valley, BC, Canada; Luang Phrabang, Laos; Sagada, Philippines; Šumava, Czech Republic.
Developing	Local peoples' traditions start to deteriorate, and they begin losing control over their land to developers and AMs. Cost of living starts to increase. AMs mainly insensitive to their impacts.	Recreation, tourism and especially second-home AMs becoming major economic force mixed with traditional. Moderate income/employment levels with few hi-tech starting to notably higher.	Although some debate on attracting more AMs, local leaders are pro-growth. Start new land use regulations to assure people growth will be controlled. Clever developers may outsmart less informed locals.	Second-home development spreading into mountains and protected areas along with resort development, paralleled by increased property speculation.	Canmore, AB, Canada; Flathead County, MO, USA; San Martín de los Andes, Argentina; San Miguel de Allende, Mexico; Snowy Mtn and Victorian Alps, Australia.
Mature	AMs displace local residents, especially with increased cost of living. Disparity between AMs' lifestyle and local peoples'. Tension between keeping community character and taking advantage of commercial opportunities.	AMs activities largely taken over economy, with tourism becoming smaller part of economy. Economic base may be stagnating, so innovation needed. Property prices considerably increased.	Inter-jurisdictional issues common as natural resources to support growth imported from rural areas. Power of developers remains and in conflict with many AMs and locals wanting to shut the gate on growth. Some AMs are elected locally.	Loss of open space/rural character as residential and recreation uses dominate landscape. Increased subdivision build out and resort growth continues. Natural environment and local public services increasingly stressed.	Jackson Hole, WY, Aspen, CO, and Adirondack Park, NY, USA.

Table 21.1. Contemporary mountain amenity migration key characteristics.—cont'd

	Characteristic phases				
	Socio-cultural	Economic	Political	Land use pattern and environmental	Examples
Sustaining	More social programmes for locals, especially improving skills to participate in the New Economy. Affordable housing closer in for lower-income residents.	More hi-tech R&D and integrated with other knowledge activities, high-end agriculture, culture and eco-tourism. Emphasis on local base with low imports.	Better-skilled and eco-informed decision making with more community involvement. Bioregional collaboration grows.	Higher-density development with effective use of resources. Environmental rehabilitation and very constrained or no open space conversion.	Whistler, BC, Canada; Grenoble, France; Davos, Switzerland.
Declining	Many or most local residents can not live in or adjacent to high-cost centre, so workers housing, fewer amenities and less tax base in periphery. Services overwhelmed by demand as commuting and low-income population increases.	Mass tourism taking over again with much less profit than previous phase. Knowledge industries and other AMs activities leaving. Property values plateau and begin declining at differing rates.	Local leaders remain pro-growth and side with land developers. Anti-growth locals and AMs mainly burnt-out. Those who can, leave and of those staying few are politically involved.	Environment urbanized with biophysical quality disappearing: landscape fragmented, wildlife decreasing. Environmental stress intensifies, with increased waste and pollution.	Baguio, Philippines; Santa Fe, NM, USA.

Note: AM, amenity migration; AMs, amenity migrants.

Also, amenity seekers may be a significant component of the population growth of smaller cities proximate to mountains in western North America, such as Albuquerque, Calgary, Denver and Salt Lake City. Recent study of the considerable in-migration to Calgary, especially its rapidly expanding suburbs, found that the amenity of the nearby Rocky Mountains was one reason for relocation (Worbets and Berdahl, 2003; Robinson and Stark, Chapter 8, this volume). The information about Calgary also indicates that in-migration is happening because of the city's employment opportunities. Unlike in the Alps, convenient public transit is far from common in North American mountain areas. But this may be coming. For example, there are now successful bus systems serving the Yosemite Area in California and the Zion National Park area of Utah, and recently the Governor of New Mexico made a commitment to build a commuter rail link between Albuquerque and Santa Fe. This link will also bring urban-dwelling amenity seekers more easily into the state's northern mountains.

The above patterning needs considerable further clarification: both the motivations for in-migration and the character of the growth and development. To what extent are these urban areas evolving with the characteristic quality of life of the European Alpine cities, or rather with those of the large metropolitan areas of North America from which many people are fleeing? Looking for a larger pattern: particularly with economic success, is mountain amenity-led migration becoming a more general phenomenon encompassing both expanding and urbanizing mountain human settlement and cities at the periphery of mountains? With such change, what will be the future quality of mountain cultural and environmental amenities, and the difference between life in mountain areas and elsewhere, especially in lowland cities?

Increasing Mountain Perspective and Knowledge

Awareness and concern for the special properties of mountains and understanding their primary role in sustaining the ecological integrity of the Earth continue to grow (Messerli and Ives, 1997; Price, 2004; Huber *et al.*, 2005; UNESCO-MAB, 2005; Messerli, forthcoming). However, it is

essential that a mountain perspective becomes much more generally held, along with further deepening of knowledge about mountains and greater distribution of this knowledge. These objectives were emphasized in the concluding chapter of Messerli and Ives's (1997) comprehensive volume on the global condition of mountains, and 2 years later, in a similar publication focused on mountain tourism (Godde *et al.*, 1999), they were incorporated as two of the four strategic objectives essential for sustainable mountain tourism. They are also integral to the work of The Mountain Partnership, established in 2002 to improve the lives of mountain people and protect mountain environments globally (Hofer, 2005). Meeting these objectives is equally important for achieving more appropriate amenity migration. In this context, deeper humanistic and scientific inquiry must also be undertaken about mountain migration.

Short- and Longer-range Change

Without concerted action to change the growth and development pattern now dominating high-amenity mountain places in the USA, and other places with a similar cultural context (see Chapter 1, *The Effects of Mountain Amenity Migration*, this volume), it is likely that the present trend of degrading cultural and environmental amenities will continue. Because of the propulsive force of this trend, and the present poor state of preparedness for addressing it, significantly affecting it in the shorter term (5–10 years) will be very difficult, even with concerted, corrective action. Except for atypical circumstances, positive change may only be possible in the longer run. If so, mountain amenities will continue to be diminished before this change is realized, especially in the most accessible places. This likelihood raises the subject of ecosystems rehabilitation, which although recognized as important, is not addressed here.

For the longer run, I agree with Jobs's (2000) prognosis for small rural towns with high amenity in the US West: success, especially economic success, will most likely continue to increase their populations and with this growth their more traditional socio-cultural structure and physical environment will become increasingly

degraded. But this future is also likely for a larger venue, those mountain places being driven by similar values, norms and behaviour (see Chapter 1, *The Effects of Mountain Amenity Migration*, this volume). Also, growing cities near mountains will probably follow a similar path. However, the mountain ecologies in much of Western Europe can be sustained if present management principles are retained, especially firm land use control and the willingness to give the commonweal significant priority over individual wants. But determination will be an imperative, as there are signs that even some of the peri-Alpine cities have begun to sprawl (Perlik, Chapter 15, this volume).

If values typically lead to behaviour and establish norms of behaviour, then the societal values that are deterring the sustaining of mountain cultural and environmental amenities need to be changed, or their negative influence much better controlled. This is an immense task, especially as little has been accomplished in changing the same values that are also driving the destruction of the Earth's biosphere (Ehrenfeld, 1987; Ewen, 1988; Wilson, 1988; Griesgraber and Gunter, 1996; Harman, 1998; Diamond, 2005). As I pointed out in Chapter 1 of this volume, what is happening in our mountains is the larger global condition in a cockpit. Below I outline four necessary value changes. Their value weights vary with local circumstances, but they appear today to directly and indirectly dominate, and seem especially evident in contemporary mountain western North America. There are a number of ways to present these values, and here it is from the perspective of sustaining mountain ecologies. Moreover, I only note the tip of the iceberg, while referencing more complete arguments.

Value change

1. The anthropocentric view of Nature (Nature being understood as the full compliment of Earth's biodiversity) must be transformed into a universalistic perspective on the non-humanistic value of communities and species (Leopold, 1949; Ehrenfeld, 1978; Capra, 1983; Botkin, 1990; Foreman, 1991; Harman, 1998). Aristotle's view of Nature as being designed to meet humanity's needs was incorrect, and probably never more so

than today. While technology is, or rather should be, the handmaiden of humans, Nature is not, and cannot be made so. Technology is the principal means for humans to contribute to life, mainly human life, but it cannot replace Nature for supporting our existence. To assume it can is a delusion. This proposal does not deny the significant place of humankind in the biosphere, but rather addresses the need for far greater harmonizing of it. There are other constructions of this problem. For one in Alpine context, see Bätzing and Perlik (1996).

2. The use of utility as *the* arbitrator of value, and its pseudo-scientific application of 'resource value' to conditions and objects of intrinsic value, must be placed again in the larger non-humanistic context. The simplistically and illogically extrapolated 'tell us what it is good for' trap is to be rejected (Leopold, 1949; Capra, 1983; Ehrenfeld, 1987; Ehrlich and Ehrlich, 2002). Integral to this is the necessary shift from a growth criterion for decision making and planning to one of sustainable development (Henderson, 1991; Griesgraber and Gunter, 1996; Brown, 2001). Here, if space permitted it would be appropriate to delve further into the artificiality of the mechanistic model upon which utility and economic motives rely, and the emerging shift to a holistic paradigm.

3. The philosophy and cult of the individual and her/his freedom to act unfettered has been especially championed in the historical frontier context, and continues to be common in the *faux* frontier of the contemporary move to the mountains. Through time, and particularly contemporarily, in consort with the other values noted here, the cultural meme of unbridled individualism has brought about the severe diminishment of the collective and its commonweal (Lyons, 1980; Devall, 1988). The prerogatives of the individual and her/his property have become too dominant, especially in a world of diminished biodiversity. Community, its commons and the public's role in decision making needs to be re-established as a strategic societal value.

4. The value of material accumulation has become excessive, with human acquisitiveness and conspicuous consumption being generally elevated to a social norm. Much assisted by our prolific material production technology, consumption is far out of proportion with both the

Earth's ability to sustainably provide and the fair distribution of its diminishing bounty. This focus, especially in the child's environment, also cripples inner spiritual development, the alternative to outer fixation on consumption of objects, including the natural environment and culture of others. A by-product of this value is the mounting proliferation and acceptance of waste material, the result of built-in obsolescence and disposability of goods. Personal, corporate and governmental commoditization and consumerism need to be rolled back along with the other value changes indicated here (Ewen, 1988; Elgin, 1993; Ehrlich and Ehrlich, 2004).

Considering the extensive character of discussions that have taken place concerning the need for such value change over the past several decades, with but little resultant actual change, I am not optimistic about the re-evaluation of these basic values generally occurring, or it occurring soon enough to significantly staunch the destruction of mountain cultures and natural environment, destruction resulting especially from amenity migration. Therefore, with or without this change transpiring, considerably more local action must be taken to change or manipulate prevailing values and their detrimental effects. In doing so, opportunities will be created for other mountain futures, and I have outlined below a set of strategic means that should assist in bringing them about. Each has been identified elsewhere before, their particular significance here is that they need to be established and operationalized as an integrated set, and also that they have been selected specifically for addressing the key issues amenity-led migration presents today. To the degree that this set of means can be systemically pursued and realized, mountain ecological sustainability will likely result. Success will also demand considerable innovation and determination. Even then the challenge will be great.

Strategic means

1. The most appropriate and potentially successful venue for action is the local community; but with the local networked with strategic national and international entities (however, only strategic ones). By 'local', I refer to both the



Fig. 21.2. Chamonix, France, an important European Alpine amenity migration centre, showing townspeople enjoying climbing a crag in town with the Mt Blanc massif above in the background (photograph: L. McMillan, October 1991).

regional territory (bioregional) and the smaller communities within a region. In particular, collaboration of the smaller communities within a bioregion is essential to successful outcomes in ecosystem conservation and guidance, scale economies and diseconomies management and the attainment of optimal political clout. This is especially significant for mountain areas due to their particular biophysical properties (see Chapter 1, *Why a Mountain Focus for Amenity Migration?* this volume), and under-representation in the lowland centres of political-economic power. With amenity migrants' higher valuing of mountain attributes, these externally based interests and activities have increased.

2. A collaborative partnership between non-governmental, not-for-profit community-based organizations and local representative government promises the greatest success. However, to date this appears rare, as often the former organizations have been born of the perceived or real

failure of government. Another major constraint to overcome is inter-organizational incompatibility of objectives and competition for quite limited funding. Yet, there are examples of successful collaboration among these bodies. Another more significant issue is the involvement of non-local special interest organizations with their global agendas, which often obfuscates local focus and consumes scarce local resources. Also, maintaining local government's ability to represent local values and effectively carry them into policy formulation and implementation becomes increasingly difficult as the number of amenity-led migrants grows.

3. A globally informed, appropriate and highly skilled level of decision making and implementation is necessary. This is particularly difficult for rural mountain places experiencing considerable and rapid change, as historically they typically did not have these attributes.

First, decision makers must have a clearly understood and agreed-upon planning and management framework for sustainable development, one with the following key characteristics: eco-systemic, egalitarian, long range, proactive, using probabilistic futures modelling (preferably with alternative multi-scenarios) and a universalistic calculus (not basically utilitarian).

Second, but equally important, is engagement of appropriate key planners and administrators. Here 'appropriate' means that their education and experience should conform to the above characteristics, and to the extent possible they should excel in their fields. Quite significant additional criteria are their commitment and determination to achieve the local mission. Initially, it may be difficult to find these professionals, but the bar should be kept as high as possible. However, there is likely to be some surplus of these types of professionals, as the general milieu is not seeking them, and later, with successes, more will be attracted to qualify themselves to participate. Also, among these professionals there are probably significant numbers, or potential numbers, of mountain amenity migrants. Nevertheless, this will likely demand reallocation or raising of additional fiscal resources (see point 4 below).

4. Maintaining and increasing ecologically supportive socio-cultural and economic behaviour is another important mean. First, shifting the

framework from population and economic growth to ecological or sustainable development creates an appropriate context. Within it, economic base diversification must be aggressively sought, with a focus on environmentally friendly activities.

Second, the community must determine who will profit from the common attributes of their high-amenity place, and in what equitable manner. A reward and sanction system should be formulated and diligently enforced, especially for land conservation and conversion. In the more general sphere, local quality job generation, good conservation practice and innovation, along with community belonging (not ownership) by individuals, public and private organizations should be publicly recognized and rewarded. Depending on assessment of local needs, permanent amenity migration, or its intent, should be favoured over the more intermittent types, and related incentives and disincentives programmes should be formulated.

In a related vein, second-home owners, along with tourists, should shoulder their share of the cost of sustaining the amenities base they come to experience, including fair compensation for the stewardship role of local inhabitants. These funds should not only be earmarked for direct investment in sustaining cultural and natural amenities, but also for improving local social services, including education, health care, etc. This focus in particular will demand innovative assessment and redistribution mechanisms. For example, successful implementation of these changes would be considerably assisted by governments changing the current ways they register rural population. Presently they fail to acknowledge the actual population distribution by ignoring second-home owners (see Müller, Chapter 17, this volume).

External costs of production, especially negative impacts on environmental and cultural amenities, need to be much more internalized in the cost of production, especially in the construction, recreation and transportation sectors. In the cultural realm, innovative ways to reward indigenous peoples for their contribution to local amenities must be found, as well as paying for the negative 'beyond the market' costs to their

culture, especially arising from manipulation of the natural environment. Difficult to do, especially by local and regional authorities, but social costs and benefits need to be brought into alignment.

Local education can play a very important role, one that is frequently not pursued because of its longer-term payback period. For example, from the primary school level, ‘nature literacy’ and ‘environmental ethics’ should be a standard part of the required curriculum. It should focus on the local bioregion, which may also increase a sense of belonging and responsibility. Much more should also be done with adult education, in both formal and non-formal contexts.

These four strategic means for sustaining mountain ecologies in high-amenity places must be integrated within a strategic framework. The amenity migration construct (see Fig. 1.5), even in its present developmental state, would serve this purpose well. Within the context of the amenity migration construct and the above strategic conditions, the newer conservation tools (see Chapter 1, Action Taken to Date, this volume) also have a much greater likelihood of success.

Local and regional public bodies, especially in mountain areas, have typically quite constrained human and financial means, but a great deal more can be accomplished than in the past by focusing on implementing the above proposals. In doing so, a determination and will to enforce is basic. Too many places have brought about paper changes, such as the formulation and promulgation of growth management and other plans, and resources-conserving ordinances, but are sorely deficient when it comes to their enforcement. Good intentions rarely solve problems. There will also be fear of lost public and private incomes, and some will likely be lost, especially in the short run, and particularly for places that develop early a reputation for determined protection of their ecosystems and living traditions.

A fifth strategic means for making the best of mountain amenity migration should also be pursued, one not generally within the purview of mountain communities. Large cities must improve their own liveability: become more attractive to their inhabitants. This could reduce

the desire or need for out-migration to mountain areas.

Other Important Factors and the Larger Uncertainty

Combined with the growing pace at which we are destroying our supporting biosphere, more generally we are faced with an increasingly difficult world in which to meet the challenge to mountain ecologies from amenity-led migration. In this environment are quite significant global factors that need strategic attention. Two key factors that will probably bring more people into mountain areas to compete for and put more pressure on the amenities are:

1. The increasing attractiveness of mountain areas due to global warming. While the snow recreation industry is focused on the detrimental effects of this climate change where their present investments are concentrated (not yet in northern Canada and Russia), there is another aspect of this change to consider. It is likely that significantly more people will be attracted to mountain areas to reduce risk from residence in coastal areas. To some extent this attraction will be countered by likely increase in risk to mountain residences also caused by climate change: flood, landslide, etc. (see Chapter 1, Why a Mountain Focus for Amenity Migration? this volume).
2. The increasing threat of ‘terrorism’, which will probably stimulate further migration from especially metropolitan areas to more rural, smaller human settlements, including mountain ones. Related risk scenarios place large urban agglomerations generally at highest risk. Whatever one’s perspective on the causes of increasing global conflict, outside a most optimistic future scenario, the growing scarcity of Earth’s resources or amenities, and the increasing control over them by a few wealthy nations, wealthy corporations and wealthy individuals, strongly suggests increasing conflict between the haves and the have-nots. This in turn indicates the continued use of ‘terrorist’ tactics.

In addition, despite the considerable growth and spread of mountain amenity migration to date, it may decline or even disappear because of:

1. The severe degradation or depletion of mountain amenities to a threshold below that which attracts the amenity seekers. Principally, this will come about by increased population and its density in mountain areas, and settlements being little different from lowland cities. This change would be particularly amplified by the considerable increase of risk-reducing non-amenity in-migrants and the continuance of current dominant values and behavioural norms.

2. In some locations the local inhabitants may develop specific strategies for marginalizing or excluding many or most amenity migrants, such as pronounced disincentives to in-migration. This would include targeted price-based fees and taxes and regulatory controls, as well as maintaining comparatively low standards of public services and facilities, including inconvenient access.

3. Significant shifts away from societal values that presently promote mountain amenity migration, such as a greater valuing of metropolitan-located culture and experiences. Metropolitan areas would assist this change by improving their attractiveness. Also, part of amenity migration, like tourism, is predicated on the fickle image of what is fashionable, especially dictated by the entertainment and political industries.

4. Marked increases in the cost of necessary support systems, such as transportation and communications, waste disposal and water, due especially to water and energy prices. The energy crisis of a post-oil-depletion world would reduce

mobility, and so amenity migration, especially second-home ownership, while increasing the local dependency and self-sufficiency of those who remain in mountain regions, particularly the more physically remote.

5. The significant decrease in discretionary wealth due to regional or global inflation and economic depression.

Also, the unfolding of these seven key factors in differing combinations is quite plausible. And while mountain amenity migration may or may not be with us by the end of this century, against a closer horizon, it appears common to many of our futures. This phenomenon is one more indication of the critical need for coherent local and global action to protect and regenerate our diminishing cultural diversity and environmental quality, especially where they are still concentrated in our mountain areas.

The predominant effect of amenity migration on mountain ecologies, including their human communities, has been detrimental. This needs reversal for the benefit of both the future of these fragile global attributes and we humans – whether or not we are mountain dwellers. Moreover, if this considerable challenge can be met, its strategy could possibly be instrumental in demonstrating a path through our present information society to an ecological society, whereby a nihilistic consumer age, principally driven by the role of IC technology as product, not process, will be avoided.

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