Amenity Migration In the Similkameen Valley, BC, Canada

Amenity-led Migration Survey: *Final Report*

Prepared for:
Similkameen Valley Planning Society

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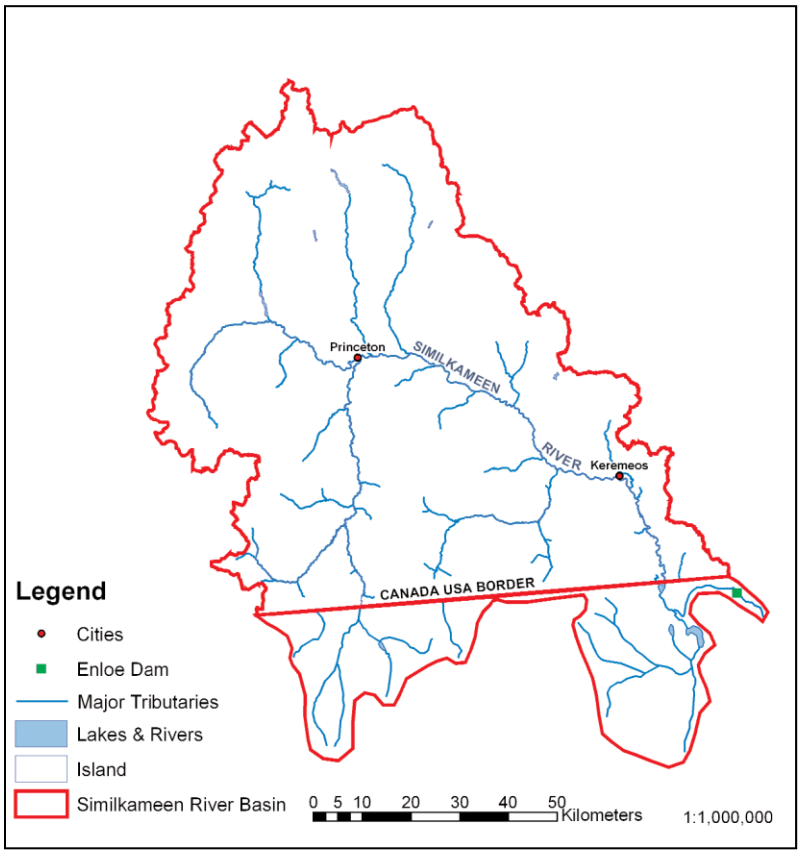
1.0 Introduction

The Similkameen Valley (the Valley) (see Fig. 1) in south central British Columbia (BC), Canada is centered on the Similkameen River that runs west to east between the Coast and Cascade mountain ranges. The western part of the Valley has a colder, moister climate than the dry, south eastern area — the northern extremity of the Sonoran Desert. It is a fertile place of some 7,239 sq km with a rich biodiversity, and in 2006 was inhabited by 9,793 people[1]. Between 2001 and 2006 the Valley's population increased 5.9% (Table 1). This increase is significant, especially in the context of both its regional jurisdiction (Regional District of Okanagan and Similkameen) (Fig. 2) and the larger province of BC. For the first time in decades the Similkameen Valley's population growth surpassed both neighbouring South Okanagan (3.4%) and BC (5.3%) (Table 2). Most of the increase came from in-migration. Based on the 2006 BC Census, the total number of new in-migrants (2001-2006) in the Valley was 2,620, making up 27% of the total Valley population in 2006 (Table 1). Area H had the largest increase in in-migration (37.6%), followed by Keremeos at 36.2%, Area G (31%) and Princeton (7.4%). Area B decreased its in-migration by 53.3%. Consequently, population grew in all these places except for Area B. Most growth occurred in Area G (12.5%), followed by Area H at 12.1%. Keremeos grew modestly at 7.7% while Princeton grew at 2.6% (Table 1, Fig. 3).

Figure 1. The Similkameen Valley, BC, Canada (*Fisheries & Oceans Canada* 2005:75)



[1] This includes the population of Indian Reserves located in Similkameen Valley.

Table 1. Similkameen Valley Population (2001-2006)

Area	2006 Population	2001 Population	% Population Change	2001-2006 new migrants	1996-2001 new migrants	% Change	% In-migration Share of 2006 Population
Alexis 9 (IR)	5	15	-66.7%	NA	NA	NA	NA
Area B	1,082	1,122	-3.6%	210	450	-53.3%	19%
Area G	2,308	2,052	12.5%	760	580	31.0%	33%
Area H	2,208	1,969	12.1%	530	385	37.6%	24%
Ashnola 10 (IR)	38	62	-38.7%	NA	NA	NA	NA
Blind Creek 6 (IR)	21	23	-8.7%	NA	NA	NA	NA
Chopaka 7 & 8 (IR)	54	48	12.5%	NA	NA	NA	NA
Chuchuwaya 2 (IR)	64	65	-1.5%	NA	NA	NA	NA
Keremeos	1,289	1197	7.7%	470	345	36.2%	36%
Lower Similkameen 2 (IR)	47	48	-2.1%	NA	NA	NA	NA
Princeton	2,677	2,610	2.6%	650	605	7.4%	24%
Total	**9,793**	**9,211**	**5.9%**	**2,620**	**2,365**	**10.7%**	**27%**

NOTE: IR (Indian Reserve)
Source: BC Statistics 2001, 2006

Figure 2. Regional District of Okanagan-Similkameen (*BC Statistics* 2006)

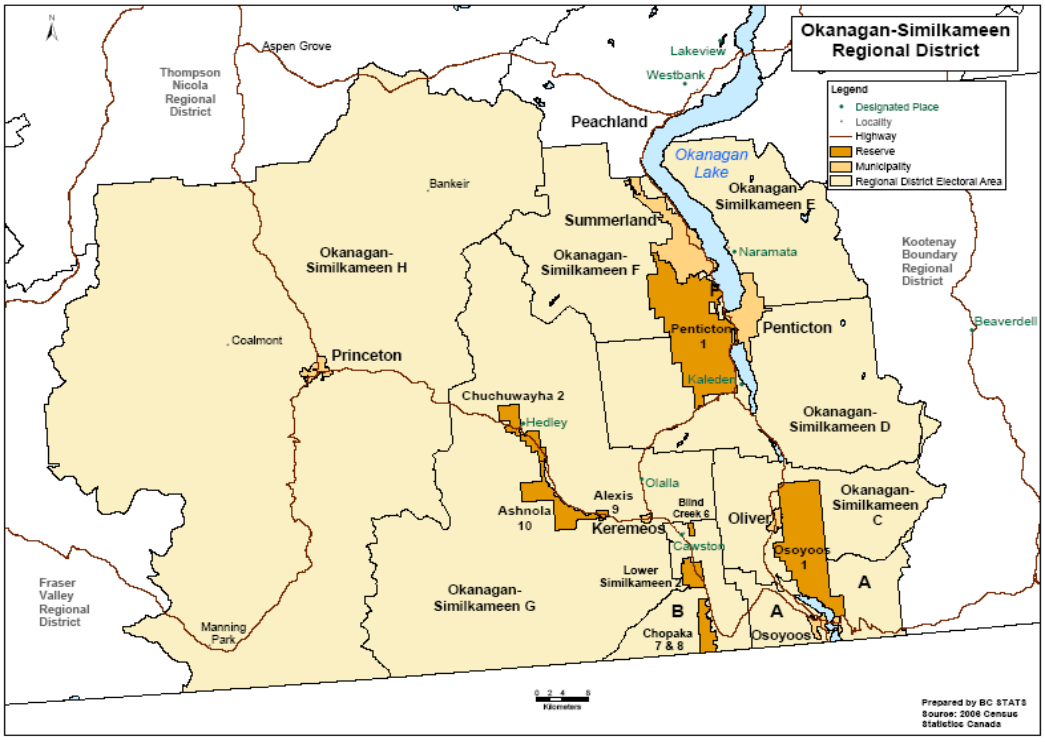
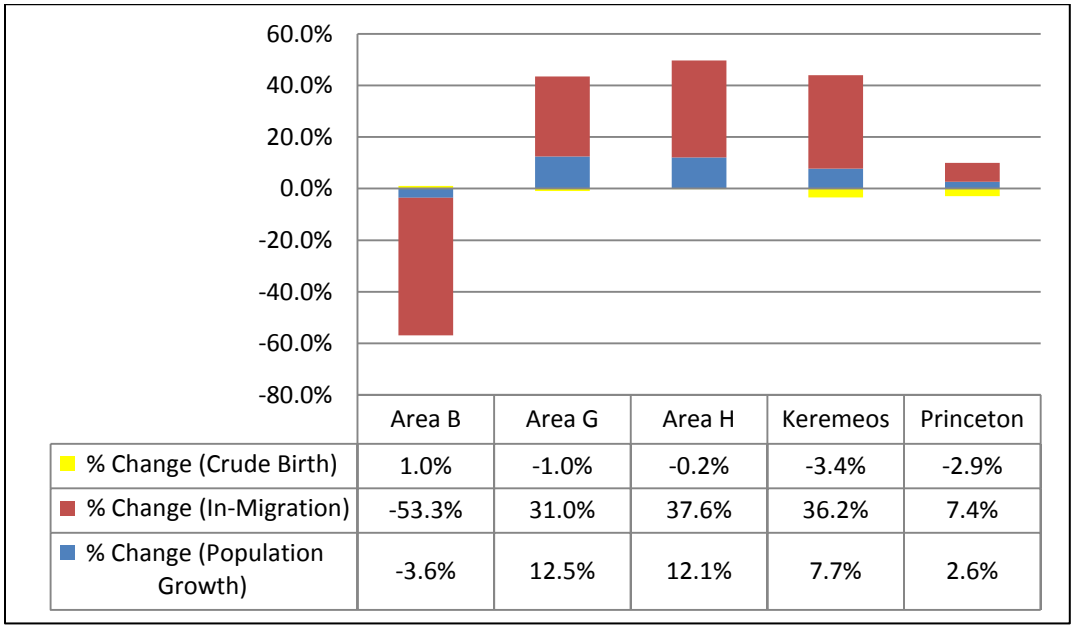


Table 2. South Okanagan Population (2001-2006)

Area	2006 Population	2001 Population	% Population Change
Area A	1,921	1,897	1.3%
Area C	3,899	4,154	-6.1%
Area D	5,913	5,703	3.7%
Area E	2,010	1,996	0.7%
Area F	2,011	1,979	1.6%
Oliver	4,370	4,224	3.5%
Osoyoos	4,752	4,295	10.6%
Osoyoos 1 (IR)	599	567	5.6%
Penticton	31,909	30,985	3.0%
Penticton 1 (IR)	1,470	901	63.2%
Summerland	10,828	10,713	1.1%
Total	**69,682**	**67,414**	**3.36%**

Note: IR (Indian Reserve)
Source: BC Statistics 2006

Figure 3. Percentage Change in Population Growth, In-Migration & Crude Birth (2001-2006)



	Area B	Area G	Area H	Keremeos	Princeton
% Change (Crude Birth)	1.0%	-1.0%	-0.2%	-3.4%	-2.9%
% Change (In-Migration)	-53.3%	31.0%	37.6%	36.2%	7.4%
% Change (Population Growth)	-3.6%	12.5%	12.1%	7.7%	2.6%

NOTE: This figure does not contain information on in-migration in Indian Reserves located in the Valley because of unavailability of data in BC Census 2001, 2006.
Source: BC Statistics 2001, 2006.

The Similkameen's population growth fits a pattern that has been unfolding further to the south since the 1970s, and especially during the 1990s. Due mainly to in-migration, population growth rate of rural areas of the USA not only dramatically increased, but surpassed that of metropolitan areas, reversing the 150-history of US urbanization (*Johnson* and *Cromartie* 2006). While generally rural places grew, it is the high amenity-rich rural places that grew the most (*McGranahan* 1999, 2008). In particular, the US rural west, or the *New West* (from the Rocky Mountain Front Range to the Pacific Coast) has attracted most in-migrants (*Nelson* 2006, *Travis* 2007). Although information about this change is most available for the US New West, a similar amenity-led migration pattern and effects are reported elsewhere in western Canada and in upland and mountain regions more globally. It has been referred to as *amenity migration* (see especially *McIntyre et al* 2006, *Moss* 1994, 2006). The August, 2007 Similkameen Valley household survey for this project found 64% of its respondents were this kind of migrant.

Amenity migration — the movement of people to places rich in natural and/or cultural amenities — offers opportunities such as economic growth and diversification, improved services and facilities along with new ideas and experiences (*McGranahan* and *Wojan* 2007, *Moss* 2006, *Rasker* and *Alexander* 2003). While some high amenity, rural communities experience these benefits, there have also been serious negative effects. Socio-economic ones include lack of affordable housing, increasing cost of living, widening income disparity between earlier inhabitants and amenity migrants and social and physical dislocation of people of modest means. The most common biophysical outcomes are low-density sprawl, land fragmentation with conversion to residential development, increasing urban-wildland interface and depletion of water resources along with more general stress on ecological systems (*Glorioso* and *Moss* 2007, *Gobster* and *Haight* 2004, *Power* 1996).

The Similkameen Valley Planning Society (SVPS), a not-for-profit organization based in Keremeos and Princeton, BC, became aware of the growing change amenity migration was bringing to the Valley. For example, amenity migrants seemed to play a dominant role in Area B's (Table 3) dwelling average value increasing between 2001 and 2006 by 67% ($143,981 to $404,525). Therefore, in 2007, SVPS initiated a project that would study and strategically respond to amenity migration. In Phase I of the project, amenity migration surveys were undertaken to inform the Valley's decision-makers, planners and residents of the role and impacts of amenity migration to their communities. These surveys undertaken in both the Similkameen and South Okanagan Valleys produced significant and useful information, and have been reported in three documents:

Table 3. Housing Affordability in Similkameen Valley

Area	2006 Dwelling Average Value ($)	2001 Dwelling Average Value ($)	% Change from 2001 to 2006	% of **Renters** paying ≥ 30% of household income on housing (2006)	% of **Owners** paying ≥ 30% of household income on housing (2006)
Area B	404,525	143,981	64%	33%	36%
Area G	182,522	96,357	47%	46%	16%
Area H	323,374	170,437	47%	20%	23%
Keremeos	189,628	102,305	46%	49%	16%
Princeton	246,194	97,115	55%	49%	16%
Total Ave.	269,248	122,039	45%	39%	21%

Notes: BC average dwelling value in 2006 was $418,703.
There is no information about Indian Reserves.

1. *Amenity-Led Migration in the Similkameen & South Okanagan Valleys, Project Phase 1 Technical Report*, International Amenity Migration Centre (14 April & 24 June, 2008). This detailed report (see Appendix B) includes the findings for the projects' two surveys (key informant survey and random household survey) in the Similkameen and South Okanagan Valleys.
2. *Summary Report: Similkameen In-Migration Survey*, Similkameen Valley Planning Society (May 2008). This interim report outlines key findings of the household survey's Similkameen Valley part.
3. *Similkameen-South Okanagan Amenity Migrant Study, Special Report to Parks Canada: Empirical Analysis of Selected Survey Questions*, Similkameen Valley Planning Society, (January, 2008). The report provided information to *Parks Canada* for the socio-economic analysis part of its South Okanagan and Similkameen National Park Reserve Feasibility Study.

Due to a short fall in funds for analysing the survey information, the above reports used only descriptive statistical analysis that summarized and displayed the data using simple statistical tools, such as percent, average, and median. Although it was an important step in understanding the amenity migration phenomenon in the Valley, a more sophisticated level of analysis would be an asset for the project's next phases, crafting a strategy (Phase 2) and action plans (Phase 3) for the sustainability of the Similkameen Valley. Therefore in Phase 2 some

funding was allocated to improve the information, especially through using inferential statistical analysis[2].

Phase 2 of the project and this report focuses on conditions in the Similkameen Valley. However, it includes some results for the South Okanagan Valley part of the household survey where the information is significant for understanding amenity migration in the Similkameen. For the same purpose comparisons are made with the province (using 2001 and 2006 BC Census data). The report also bridges the earlier descriptive and later inferential analyses, focusing especially on providing information for the project's Phase 2 – developing a strategy for sustainability in Similkameen Valley.

2.0 Methodology

This 2007-08 amenity-led migration study uses both quantitative and qualitative surveys. The results of the surveys were analyzed, compared and augmented by reviewing relevant literature on amenity migration, with particular emphasis on western North American mountain regions and BC Statistics 2001, 2006. Although that study was conducted in both the Similkameen and South Okanagan Valleys, only the results for the Similkameen Valley are reported here (see above discussion).

The qualitative survey was undertaken first, and consisted of in-depth interviewing of 15 key informants residing in Similkameen and South Okanagan Valleys and knowledgeable about the socio-cultural, political-economic and biophysical condition of the valleys. Among these interviewees were a mayor, organic farmer, hotel manager, real estate agent, bank manager, Indian Band development director, regional district's planning manager, NGO leaders, economic development officers, and automobile repairman. All interviews were in-person, each typically lasted about 1.5 hrs and were guided by the same set of 50 questions. The information obtained from this research tool was used in developing a random sample questionnaire of 40-questions. This sample survey was designed (Appendix C), tested and mailed to 700 property

[2] *Inferential Statistics* investigate questions, models and hypotheses. In many cases, the conclusions from inferential statistics extend beyond the immediate data alone. For instance, inferential statistics is used to try to infer from sample data a population's attitude. Or, inferential statistics is used to make judgments of the probability that an observed difference between groups is a dependable one, or one that might have happened by chance in this study. Thus, inferential statistics is used to make inferences from our data to more general conditions; and descriptive statistics is used more simply to describe what's going on in our data.

owners/households in the Similkameen Valley, which representing 14% of the Valley's owner-occupied and second home dwellings[3], and 12% of total number of Valley dwellings[4] (Table 4). Renters *per se* and Indian Reserves were not surveyed due to inaccessibility to unavailability of these rosters. These shortcomings were ameliorated to some extent by the key informant survey and Census data.

Table 4. Similkameen Valley Sample Survey Response Rate (2007)

SURVEY AREA	TOTAL OWNER OCCUPIED DWELLINGS[3] (2006)	TOTAL NO. OF DWELLINGS[4] (2006)	SURVEYS MAILED	% of OWNER-OCCUPIED DWELLINGS[2] (2006)	% of TOTAL NO. OF DWELLINGS[3] (2006)	RETURNED / COMPLETED SURVEYS	RESPONSE RATE (%)
Areas B & G	1,740	2,026	250	14%	12%	68	27%
Area H	1,796	1,902	200	11%	11%	52	26%
Keremeos	518	654	125	24%	19%	50	40%
Princeton	1,043	1366	125	12%	9%	63	50%
Total	5,097	5,948	700	14%	12%	233	33%

Source: BC Statistics 2006

The survey was self-administered by respondents in their homes. The accompanying introductory letter explaining the objectives of the survey and defined terms used in the questionnaire, such as *amenity migration*, temporal types of *amenity migrant*[5] (*permanent*[6], *seasonal*[7] and *intermittent*[8]), *economic migrant*[9], *local person*[10], *returned resident*[11] and

[3] BC Census does not include second homes in *owner-occupied dwellings*. Because second homes property owners were included in the survey the number of second homes are included in this figure.

[4] This figure includes owner-occupied, rented-occupied, and second home dwellings.

[5] *Amenity migrant* is a person who primarily moved to the Valley because of the natural or environmental amenities such as mountains, lakes, rivers, forest, climate and recreational opportunities; and/or socio-cultural amenities such as safe/friendly communities, rural values and lifestyle.

[6] *Permanent amenity migrants* reside most of the time in the high amenity place.

[7] *Seasonal amenity migrants* reside in the high amenity place for one or several periods each year, such as the summer or the ski season.

[8] *Intermittent amenity migrants* move between their residences more frequently.

[9] *Economic migrant* is a person who primarily moved to the Valley for a job, to start a business, or other economic reasons.

[10] *Local person* is someone who was born and raised in the Valley.

[11] *Returned resident* is a person who left the Valley and returned as an adult. They were classified as a separate cohort because the project's key informants did not consider them

others[12] The questions, which took from 25 to 35 minutes to complete, can be grouped into five categories: socio-economic profile; key reasons for in-migration; attitudes and behaviours toward amenities; socio-cultural, political, economic and environmental effects; and local government's ability and *will* to respond to related issues.

To increase participation, the survey was advertised on local community notice boards, in local newspapers and on regional radio, and several editorials were written encourage local participation. The survey was conducted in late 2007. A total of 233 respondents returned their completed questionnaire representing 33% of the total mailed (Table 4). This retention is considered high, especially for developed countries. *Johnson* and *Owens* (2003) stated that due to concerns with privacy, confidentiality, the exploitation of personal information, general cynicism, and declining civic participation, response rates have been declining in most of the industrialized world for at least several decades.

3.0 Who are the Amenity Migrants?

Amenity migrants are people who move as permanent or part time residents to a place principally because of its actual or perceived higher environmental quality[13] and/or cultural differentiation[14] (see especially *Green, Deller & Marcouiller* 2005, *Loffler & Steinicke* 2008, *Moss* 1994, 2006, *Moss, Glorioso & Krause 2009*). They are motivated mainly by opportunities these amenities afford for leisure, learning (including spiritual development), rural life-ways, and secondarily, for economic gain (Fig. 4). If economic gain is the primary motivator for locating in high amenity places, they are *economic migrants*, not *amenity migrants*. Recently, when referring to both *amenity migration* and *economic migration* in amenity-rich places the term *amenity-led migration* is often used. Climate is considered part of environmental amenity. However, to capture the more recent moving of people to escape real and anticipated negative impacts of climate change, this factor was more recently added to the amenity migration construct as key motivator (Fig. 4). This set of key motivating factors for amenity migrants are joined by a set of facilitating factors, especially access-facilitating technology (good roads, airports, wireless internet and cell phone connections, etc.), discretionary wealth, land

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as migrants, and may exhibit other specific, significant characteristics. However, they were considered as *migrants* in both 2001 and 2006 BC Census.

[12] *Others* refers to people who do not consider themselves the other types of residents.

[13] *Higher environmental quality* refers to environmental amenities, including terrestrial and aquatic landscapes, climate, air, water and biodiversity quantity and quality.

[14] *Cultural differentiation* refers to how different from others the cultural amenities of a place are. Cultural amenities refer to both intangible and tangible manifestations of human groups considered culturally valuable by their earlier originators or others.

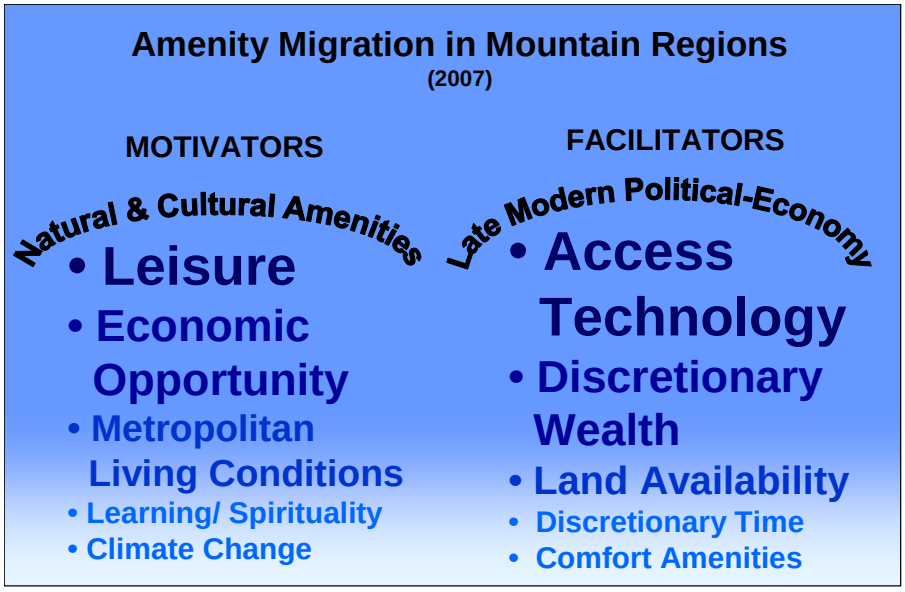


Figure 4.

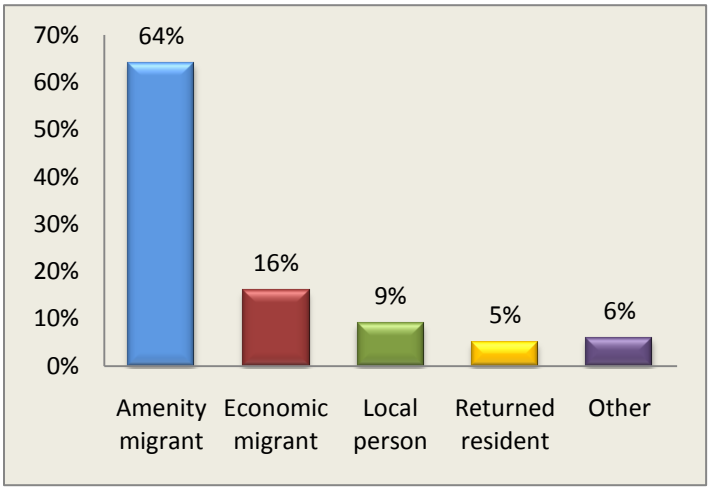
Amenity migration construct indicating comparative significance of key motivators and facilitators (*Moss* 2008:268).

availability, discretionary time, and comfort amenities (hotels, boutiques, social clubs, medical specialists, etc) (Fig. 4).

4.0 Similkameen Valley Resident Types and Reasons for Residence

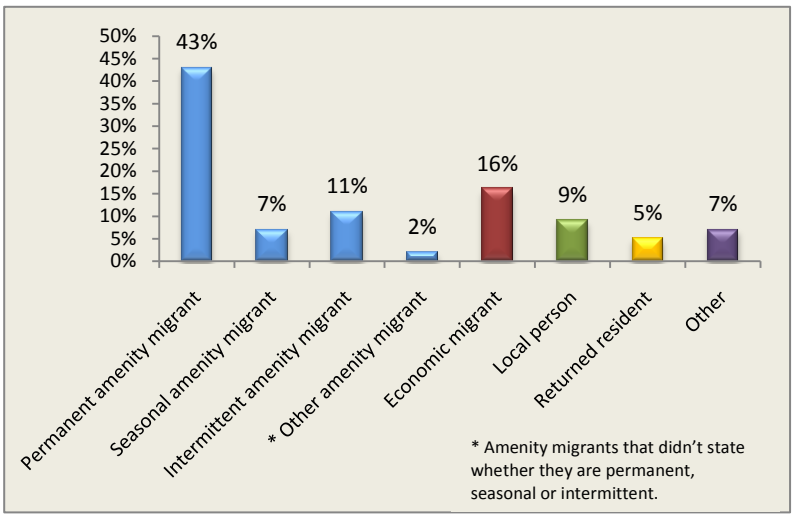
Using the above description of amenity migration, 64% of respondents in our 2007 Similkameen household survey classified themselves as *amenity migrants*, 16% as *economic migrants*, 5% as *returned residents*, 9% as *local people* and 6% *others* (Fig. 5). Breaking down the amenity migrants into permanent and part-time as percentage of all respondents, 43% were permanent amenity migrants while 18% were part-time (seasonal and intermittent) amenity migrants (Fig. 6).

Figure 5. Resident Types in Similkameen Valley



What were the reasons (motivators and facilitators) for coming to or remaining in the Similkameen Valley? Every resident type chose the natural environment and then, cultural differentiation as a *Very Important Reason* for moving to or remaining in the Valley. Looking more particularly at these reasons, the top ones chosen by all resident types were: *To enjoy clean air* (68%), *To enjoy clean rivers and*

Figure 6. Permanent and Part-time Amenity Migrants as Percentage of Total Respondents



lakes (63%), *Because of the climate* (62%), and *For peace and quiet* (59%). The 28 *Very Important* reason people gave, along with their resident type is shown in Table 5.

The top reasons for amenity migrants were:

- 1st *To enjoy clean air* (68%);
- 2nd *To enjoy clean rivers and lakes, Because of the climate, For peace and quiet* (tied at 62%); and
- 3rd *Because of mountains and mountain views* (50%).

Economic migrants' top reasons were:

- 1st *To enjoy clean rivers and lakes* (54%);
- 2nd *For a job* (51%); and
- 3rd *To enjoy clean air* & *Because of the climate* (tied at 49%).

Local persons top reasons were:

- 1st *To enjoy clean air* (67%);
- 2nd *To enjoy clean rivers and lakes and Because of mountains and mountain views* (tied at 52%); and
- 3rd *Because of the climate and For peace and quiet* (tied at 48%).

Returned residents' top reasons were:

- 1st *Because of the climate* and *To live in rural community* (tied at 64%);
- 2nd *To enjoy clean rivers and lakes* and *For peace and quiet* (tied at 54%); and
- 3rd *To enjoy clean air, Because of mountains and mountain views,* and *To live in a safer place* (tied at 46%).

Although it was clear that amenity migrants rated highly the natural environment and then culture of the Similkameen as very important reasons, some also indicated that economic reasons were also very important for moving and/or living in the Similkameen (see reasons no. 20-23, Table 5). So, a significant question for planning for the Valley's future is, are these self-identified amenity migrants primarily or secondarily motivated by economic opportunities? Are they amenity migrants or economic migrants? Likewise, are those self-identified economic migrants that rated natural environment and cultural attributes *"Very Important"* not amenity migrants?

Table 5. Very Important Reasons for Coming/Living in the Valley

REASONS	**RANK** (Based on no. of times mentioned as *Very Important reason.)*					
	Amenity Migrant	Economic Migrant	Local Person	Returned Resident	Others	All
Natural Environment						
1. To enjoy clean air.	1st (68%)	3rd (49%)	1st (67%)	3rd (46%)	1st (60%)	1st (68%)
2. To enjoy clean rivers and lakes.	2nd (62%)	1st (54%)	2nd (52%)	2nd (54%)	1st (60%)	2nd (63%)
3. Because of the climate.	2nd (62%)	3rd (49%)	3rd (48%)	1st (64%)	3rd (47%)	3rd (62%)
4. Because of mountains and mountain views.	3rd (50%)	9th (19%)	2nd (52%)	3rd (46%)	3rd (47%)	5th (48%)
5. To live in an area of diverse plants/wildlife.	5th (39%)	4th (43%)	4th (43%)	5th (27%)	2nd (53%)	7th (38%)
6. To be near parks.	12th (23%)	12th(14%)	6th (33%)	5th (27%)	6th (33%)	12th (25%)
7. To be in farm or ranch country.	16th (14%)	10th (16%)	4th (43%)	6th (18%)	9th (13%)	17th (18%)
Cultural Differentiation						
8. For peace and quiet.	2nd (62%)	6th (35%)	3rd (48%)	2nd (54%)	2nd (53%)	4th (59%)
9. To live in a safer place.	6th (37%)	7th (32%)	5th (38%)	3rd (46%)	2nd (53%)	6th (40%)
10. To live in a rural community.	8th (31%)	8th (30%)	5th (38%)	1st (64%)	2nd (53%)	8h (37%)
11. To enjoy the music or cultural scene.	18th (4%)	(0%)	9th (19%)	(0%)	8th (20%)	21st (6%)
12. Because of the wineries.	19th (3%)	12th (5%)	9th (19%)	(0%)	(0%)	22nd (5%)
13. Because it's culturally distinct.	20th (2%)	(0%)	10th (14%)	(0%)	9th (13%)	23rd (4%)
Leisure						
14. To retire.	4th (44%)	9th (16%)	8th (24%)	6th (9%)	7th (27%)	7th (38%)
15. To prepare for retirement.	11th (25%)	14th (5.4%)	7th (29%)	3rd (36%)	9th (13%)	13th (24%)
16. To be *near* abundant outdoor recreational opportunities.	7th (33%)	9th (16%)	4th (43%)	6th (18%)	6th (33%)	9th (33%)
17. Because of *diverse* outdoor						

REASONS	RANK (Based on no. of times mentioned as *Very Important reason.)*					
	Amenity Migrant	Economic Migrant	Local Person	Returned Resident	Others	All
recreational opportunities.	10th (26%)	11th (8%)	7th (29%)	7h (9%)	9th (13%)	13th (24%)
18. To be near Crown land for hunting/fishing.	13th (20%)	12th (5%)	6th (33%)	6th (18%)	9th (13%)	15th (20%)
19. To be near Crown land for motorized recreation.	14th (17%)	13th (3%)	6th (33%)	5th (27%)	10th (7%)	18th (17%)
Economic Gain/ Opportunity						
20. Because of cheaper property.	8th (31%)	7th (32%)	8th (24%)	5th (27%)	8th (20%)	10th (32%)
21. To have lower cost of living.	9th (27%)	8th (30%)	6th (33%)	5th (27%)	4th (33%)	11th (31%)
22. For a job	14th (5%)	2nd (51%)	4th (43%)	5th (27%)	6th (20%)	16th (19%)
23. To pursue a business opportunity.	18th (4%)	5th (40%)	4th (43%)	6th (18%)	9th (13%)	19th (16%)
Learning/Spirituality						
24. Because of spiritual attraction of landscape.	15th (16%)	11th (8%)	8th (24%)	6h (18%)	8th (20%)	18th (17%)
Other Reasons						
25. To be close to family or partner.	16th (14%)	10th (16%)	5th (38%)	4th (36%)	5th (40%)	13th (20%)
26. Good facilities for seniors.	12th (23%)	10th (16%)	8th (24%)	(0%)	6th (33%)	14 th (23%)
27. Because of its comfort amenities (restaurants, shops, entertainment, walk to most services).	17th (11%)	12th (5%)	9th (19%)	7th (9%)	7th (27%)	20th (12%)
28. Access to health care.	12th (23%)	10th (16%)	6th (33%)	6th (18%)	7th (27%)	13th (24%)

To determine how strongly or weakly self-identified amenity migrants value economic opportunity compared to self-identified economic migrants, an *odds ratio analysis*[15] was done (Appendix A, Table 1). The results show that compared to economic migrants, amenity migrants were 44% less likely to move to a place *"For a job"* and 94% less likely to move *"For a business opportunity"*. These results strongly indicate that *"For a job"* and *"For a business opportunity"* were secondary motivations for amenity migrants. But they were the primary motivations for economic migrants. Furthermore, the results also indicate that compared to economic migrants, amenity migrants were more motivated by the leisure opportunities of being near public land. The above results are consistent with findings of other amenity

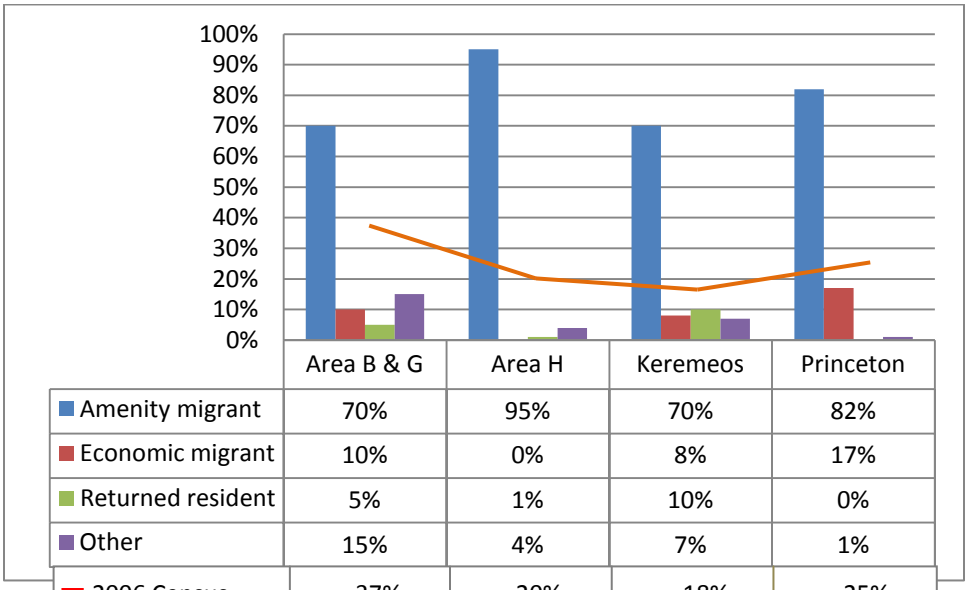
[15] An odds ratio analysis is a way of comparing whether the probability of a certain event is the same for two groups.

migration studies, including the role of wilderness and public lands in attracting migrants (see especially Dearien *et al* 2005).

5.0 Location of In-migrants in the Similkameen Valley

The household survey indicates most migrants came after the year 2000, which also corresponded with 2006 BC Census data. Of the total 2,620 in-migrants to the Valley between 2001 and 2006 identified in the 2006 Census, based on the household survey it is estimated that 80% were *amenity migrants*, 9% *economic migrants*, 4% *returned residents*, and 7% *other*. Fig. 7. shows the location of in-migrants within the Valley based on both information sources. Some 37% migrated to Area B & G[16], 25% to Princeton, 20% to Area H and 18% to Keremeos.

Figure 7. Location of Migrants to Similkameen Valley by Resident Type (2001-2006)



	Area B & G	Area H	Keremeos	Princeton
Amenity migrant	70%	95%	70%	82%
Economic migrant	10%	0%	8%	17%
Returned resident	5%	1%	10%	0%
Other	15%	4%	7%	1%
2006 Census	37%	20%	18%	25%

6.0 Comparison of Key Characteristics of Amenity Migrants with Other Residents

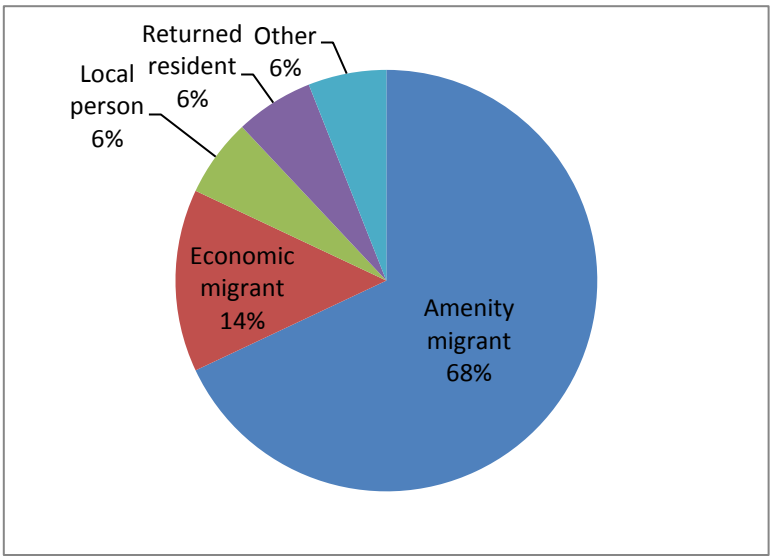
6.1 Age

Amenity migrants were the oldest among the Valley's different resident types. In 2007, the median age of *amenity migrants* was 64 years old, followed by *others* at 59 years old,

[16] In the 2006 Census, 8% migrated to Area B while 29% moved into Area G. However, in the project's household survey Area B & G were one cluster or stratum which necessitated the summing of in-migrants in Area B & G.

economic migrants at 57 years old, *returned residents* and *local people* at 55 years old. The median age of all household respondents was 60 years old. Seventy-six percent (76%) of total respondents was 55 years old and above; of which 68% were *amenity migrants* (Fig.8).

Figure 8. Percentage of Survey Respondents 55 years and Older by Resident Type.



Some Implications of Older In-migrants

According to BC Statistics the major factor driving population growth in all areas in BC from 2001-2031 has and will be in-migration. If the Valley's trend is maintained, it will continue to have a high percentage of migrants and they will likely be mature residents (55 and older). This would mean greater demand for retirement housing and health services. It will also likely result in a short fall in working age residents, labour which is needed to sustain the Valley's economy, especially agriculture and much of the service sector. Elsewhere, some high amenity places have been drawing on surrounding labour, but it appears the Valley's anticipated short will also be more general than in the Similkameen. Also, the Valley's increasing cost of living, especially housing, will dissuade younger in-migrants (see *Economic Effects…, Section 7.0*). The younger Indian Reserves' population may help, but is likely not enough to replace the Valley's aging labour force, or meet new demands.

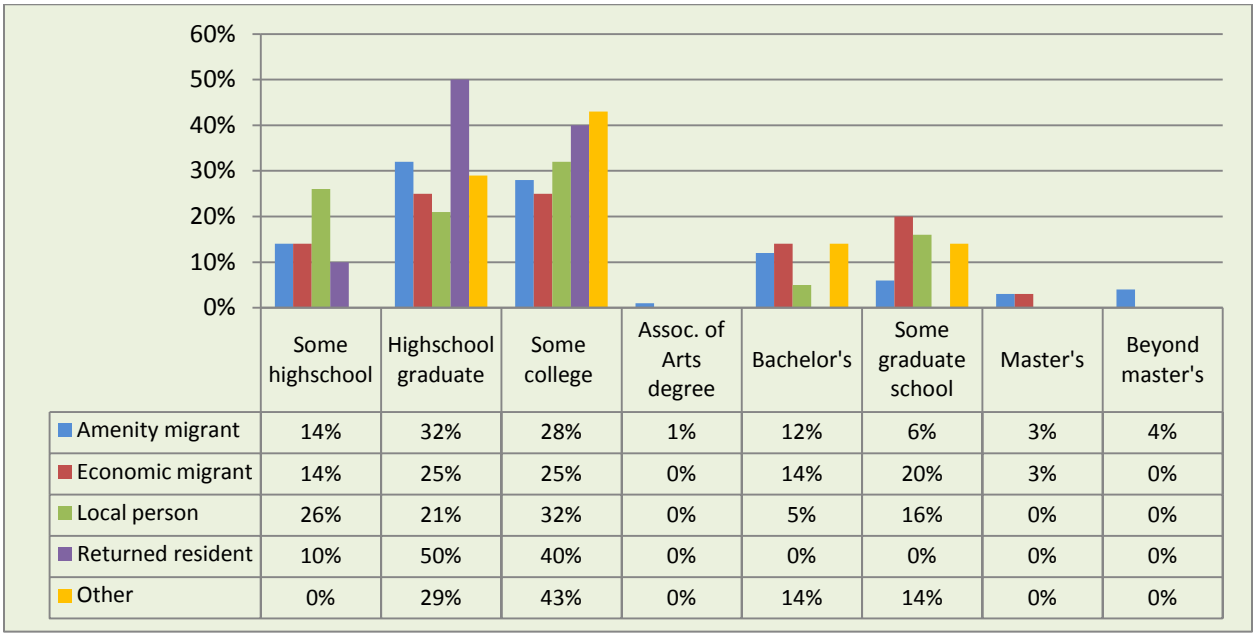
6.2 Education

The amenity migrants generally had a little higher level of formal education than any other resident type. Within this general picture the difference is most pronounced for graduate studies level (*Master's* and *Beyond Masters*), with 7% out of the total 10% attained by all resident types. *Economic migrants* (37%) and *others* (28%) had higher rates of post secondary education compared to *amenity migrants* (25%) and *local people* (21%). Both economic and amenity migrants had a higher level of educational attainment compared to local persons. But local persons were more educated than returned residents (Fig. 9).

Some Implications of Well-educated Migrants

The comparatively modest level of education of the amenity migrants suggests an early stage of the phenomenon's development, including limited *New Economy* skills. In the *New Economy* (or *Knowledge Sector),* where information replaces land and labour for generating wealth, highly educated migrants can create economic opportunities for local population that may not only lead to higher individual income but also sustained economic growth for the community they reside in. In addition, economic activities that need higher technical skills and education are typically more environmentally friendly, or *green,* such as learning industry, financial and built environment services. However, the danger is a possible mismatch of jobs that need higher skills and a local population that is not appropriately educated. Jobs in the *New Economy* need much more theoretical and analytical knowledge compared to jobs in more traditional economic activities such as agriculture, forestry and mining (except where *value-added* activities exist). Also, in many cases, jobs in the *New Economy* don't need a lot of employees, such as in computer software development.

Figure 9. Educational Attainment by Resident Type



	Some highschool	Highschool graduate	Some college	Assoc. of Arts degree	Bachelor's	Some graduate school	Master's	Beyond master's
Amenity migrant	14%	32%	28%	1%	12%	6%	3%	4%
Economic migrant	14%	25%	25%	0%	14%	20%	3%	0%
Local person	26%	21%	32%	0%	5%	16%	0%	0%
Returned resident	10%	50%	40%	0%	0%	0%	0%	0%
Other	0%	29%	43%	0%	14%	14%	0%	0%

6.3 Inadequate Income Data

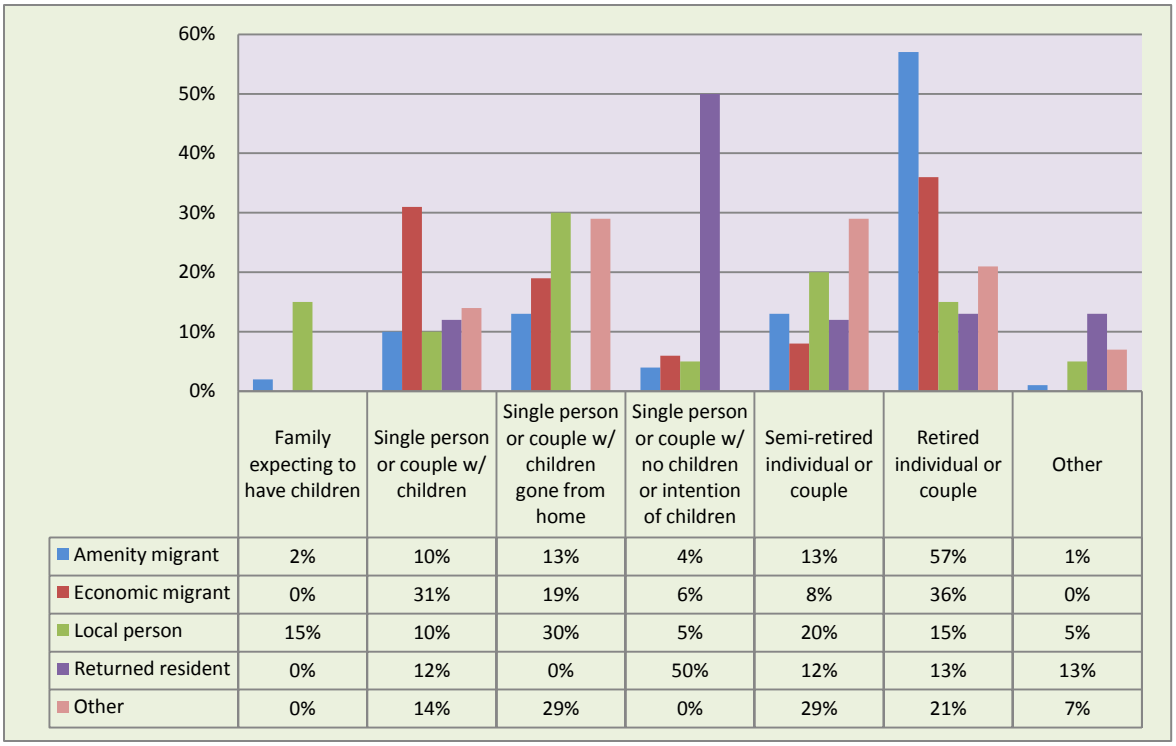
The annual household income information obtained from the survey was inadequate. Only 27% of the respondents indicated their income, and for *amenity migrants* and *economic*

migrants in particular the percentages were lower; 20% and 22% respectively. In addition, there were two entries that were highly questionable; both were for permanent amenity migrants living in Keremeos: $12M and $50M. If these two entries were valid it would be reflected in the average household income of Keremeos residents for 2006, but this information was not available. However, the average income reflected in 2006 Census was for 2005, where the average household income for Keremeos was $38,861 and the median was $34,171. If we use the survey data for income the Household median income for all resident types in 2006 would be $60,000, which was 54% higher than the Valley's 2005 median income and about 14% higher than BC's median income in 2005 of $52,709. The survey data was therefore judged unreliable.

6.4 Household Type

The data on household type (Fig. 10) was consistent with expectations from the household survey's age information, and also with the finding of the key informant survey. Among the resident types, the economic migrants had the highest percentage of households with children (31%). Due to the *amenity migrants'* age, only 12% of this resident type had or expected to have children. In addition, *amenity migrants* had the highest percentage of semi-retired and retired households (70%). The *returned residents*, who were younger than *amenity migrants*, had the same percentage of households that had or expected to have children (12%). This group also had the highest percentage among resident type that had no children or no intention of having children.

Figure 10. Household Type by Resident Type

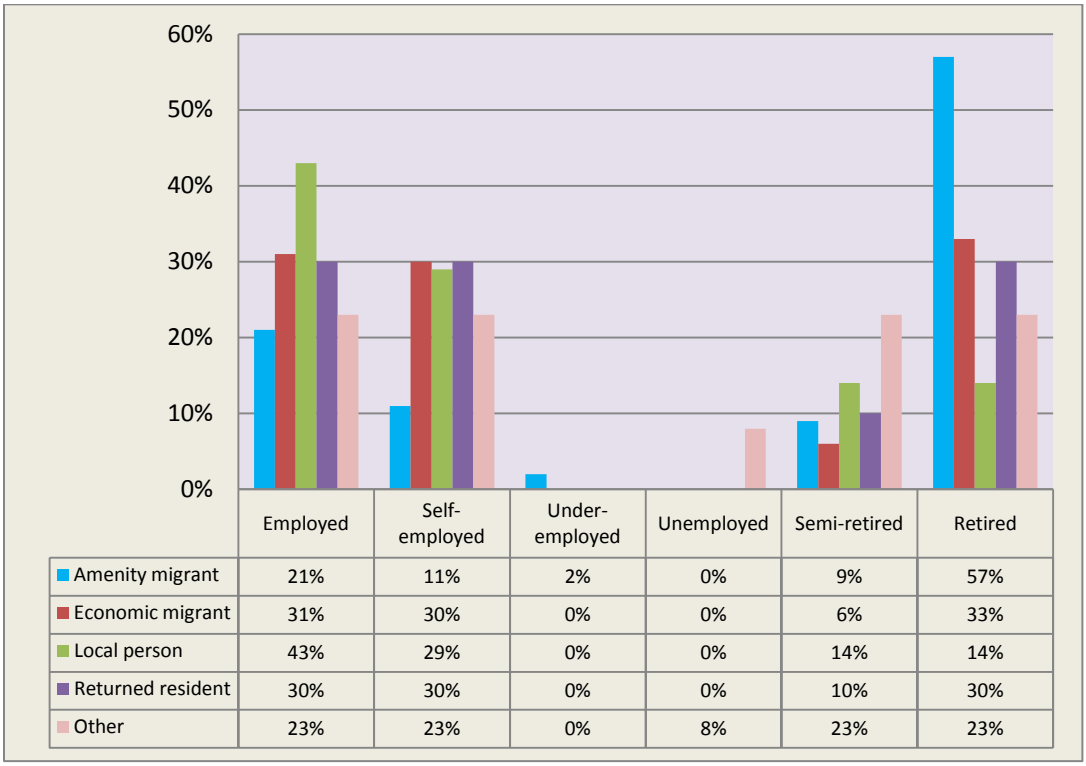


	Family expecting to have children	Single person or couple w/ children	Single person or couple w/ children gone from home	Single person or couple w/ no children or intention of children	Semi-retired individual or couple	Retired individual or couple	Other
Amenity migrant	2%	10%	13%	4%	13%	57%	1%
Economic migrant	0%	31%	19%	6%	8%	36%	0%
Local person	15%	10%	30%	5%	20%	15%	5%
Returned resident	0%	12%	0%	50%	12%	13%	13%
Other	0%	14%	29%	0%	29%	21%	7%

6.5 Employment

The employment data (Fig. 11) as anticipated from general amenity migration information, corresponded with age and household type findings. *Amenity migrants* had the highest percentage of *semi-retired* and *retired* respondents at 66%, followed by *others* at 46%, then *returned residents* at 40%, *economic migrants* at 39% and *local persons* at 28%. *Local persons* had the highest percentage of *employed* and *self-employed* respondents at 72%, followed by *economic migrants* at 61%, *returned migrants* at 60%, and then *amenity migrants* at 32%. Of all resident types only *others* (8%) were unemployed, and only *amenity migrants* (2%) were under-employed.

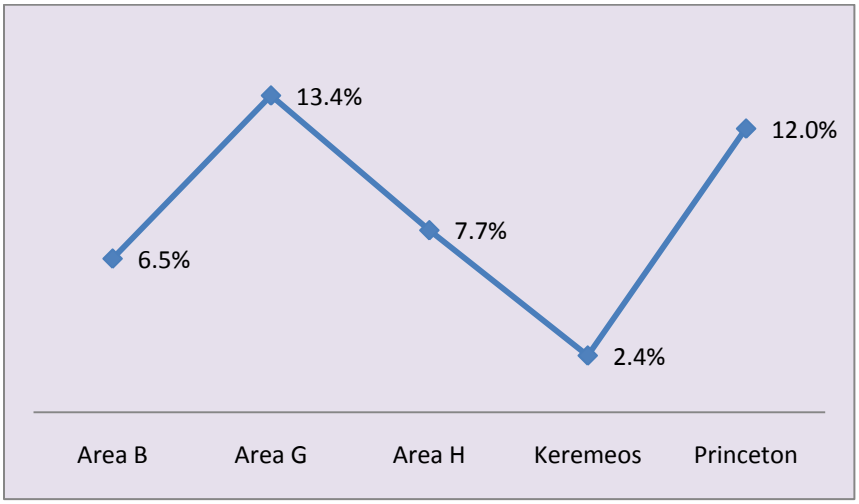
Figure 11. Employment by Resident Type



	Employed	Self-employed	Under-employed	Unemployed	Semi-retired	Retired
Amenity migrant	21%	11%	2%	0%	9%	57%
Economic migrant	31%	30%	0%	0%	6%	33%
Local person	43%	29%	0%	0%	14%	14%
Returned resident	30%	30%	0%	0%	10%	30%
Other	23%	23%	0%	8%	23%	23%

Based on the 2006 Census, the unemployment rate in the Similkameen Valley was 8.4%. This figure may be lower, because it did not include the Indian Reservations as there was no information on their unemployment rate in the 2006 Census. The Valley's unemployment rate was 1.8% higher than RDOS (6.6%), 2.4% higher than BC (6.0%) and Vancouver (6.0%). However, unemployment rate in two areas Area G (13.4%) and Princeton (12%) were much higher than the Valley's (Fig. 12).

Figure 12. Unemployment Rate in Similkameen Valley (2006)



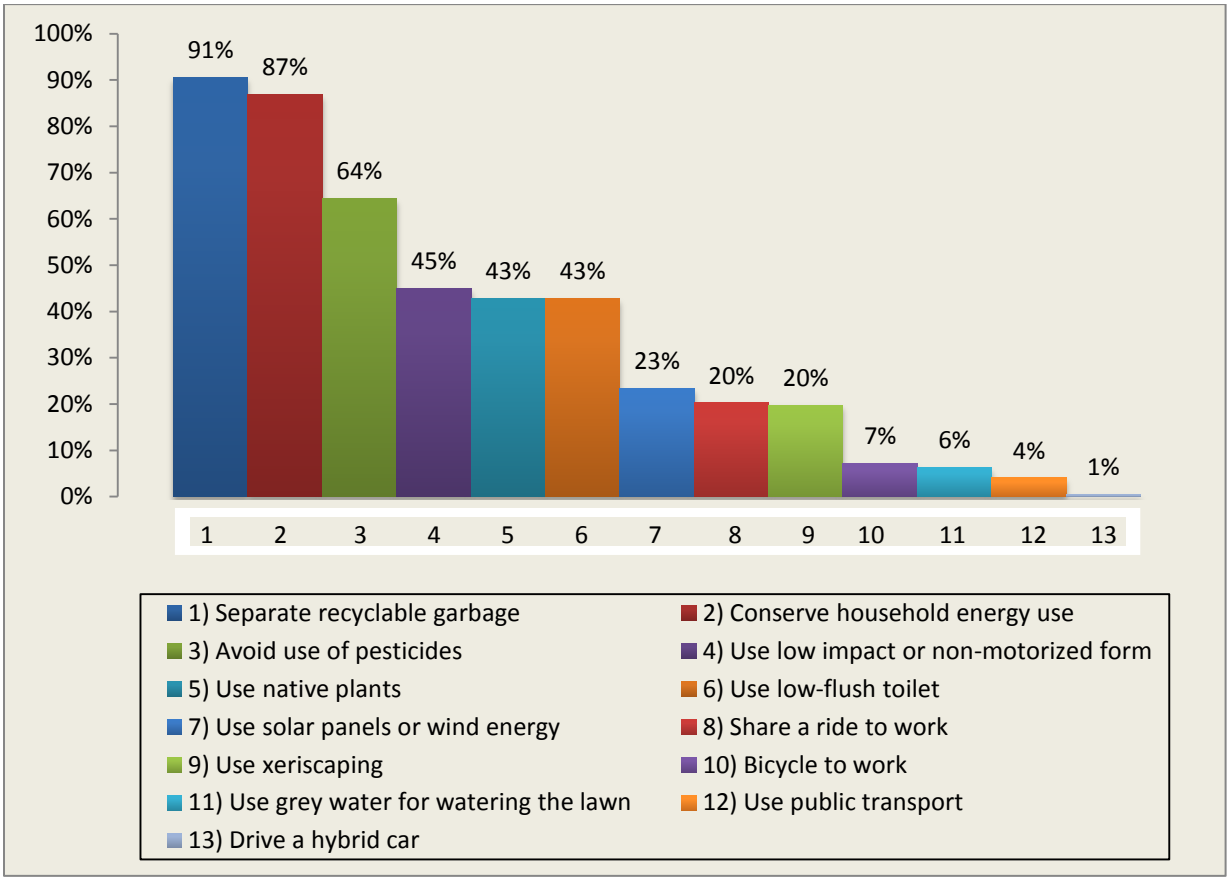
Source: BC Statistics 2006

6.6 Values and Behaviour

6.6.1 Environmental Conservation Practices

Fig. 13 shows the 13 practices undertaken to *sustain the environment* and the corresponding percentage of participation in them of all resident types in each activity. The top three environmental conservation activities in Similkameen Valley were: 1) *Separate recyclable garbage* (91%); 2) *Conserve household energy use* (87%); and 3) *Avoid use of pesticides and chemical fertilizers* (64%). More than 50% of total respondents did these. Looking at the list of 13, the level of participation in each activity decreases (from 45% to 1%) with newness or unfamiliarity of a technology (eg. use of solar panel or wind energy, 7%), and the cost involved (eg. hybrid car, 1%). But there were three exceptions to these criteria which still had low participation: 1) *Share a ride to work* (20%); 2) *Bicycle to work* (7%); and 3) *Use public transport* (4%). In general, it also seems that the lesser the direct impact of a conservation activity on an individual's health, the lesser the respondents' participation. For example, 64% of respondents avoided use of pesticides and chemical fertilizers, 43% used native plants, 20% used xeriscaping, and 1% used a hybrid car.

Figure 13. Similkameen Valley Residents Environmental Conservation Practices



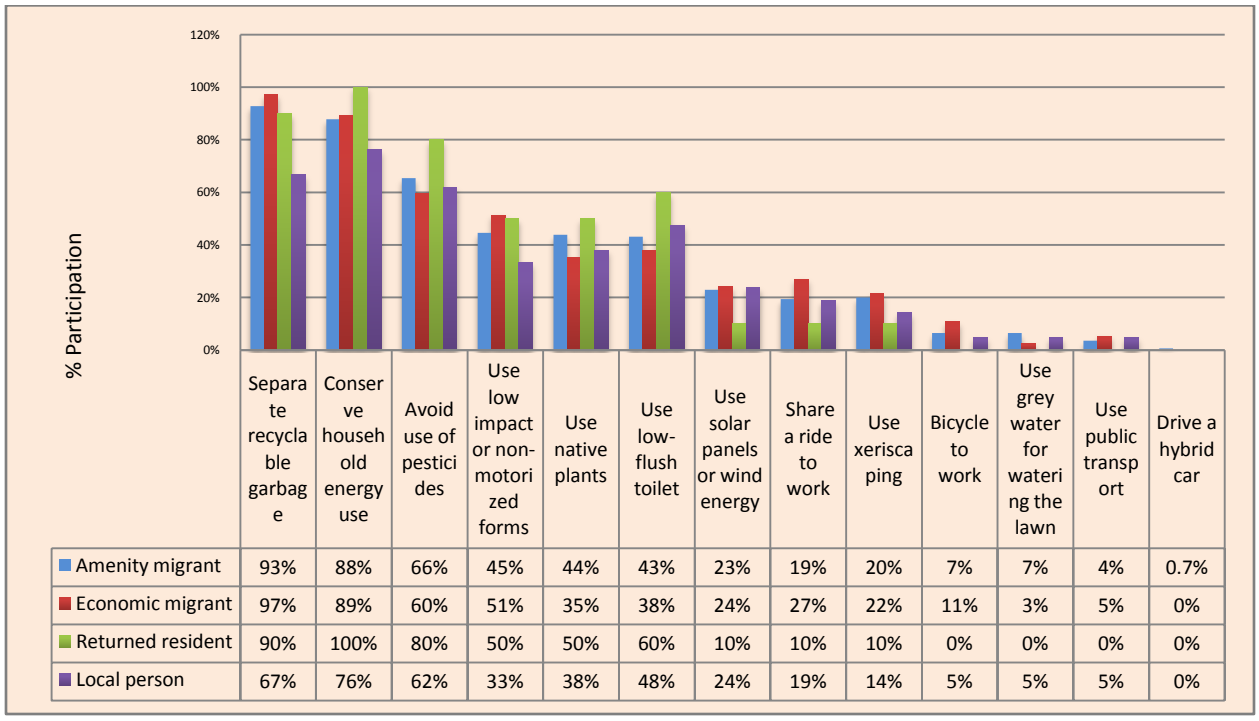
6.6.1.1 Environmental Conservation Practices of Resident Types

Some analysis of amenity migration suggests that amenity migrants can be categorized as resource-conservers or resource-consumers. The research on related behaviour of amenity migrants is quite limited, but indicates that generally their impacts on environmental amenities has been a degrading one, especially in the mountain context of comparative scarcity, poverty and ecological fragility (*Huber et al* 2005, *Moss* 2006, *Price et al* 1997, *Rasker* and *Alexander* 1997). In the household survey we obtained some indication of amenity migrants' environmental conservation behaviour along with a comparison with other Valley resident types.

Fig. 13. indicates the participation of all respondents in13 practices to sustain the environment, and Fig 14. shows the level of participation by resident type. Caution must be used in interpreting the results with the use of percentages because the total number for each

resident type differs. For example, there were 37 *economic migrants*, 21 *local persons*, 11 *returned residents*, 17 *others* compared to 147 *amenity migrants*. Because of amenity migrants' higher real number, their impact is likely greater than other resident types, as is indicated in Fig. 15.

Figure 14. Environmental Conservation Participation by Resident Type



	Separate recyclable garbage	Conserve household energy use	Avoid use of pesticides	Use low impact or non-motorized forms	Use native plants	Use low-flush toilet	Use solar panels or wind energy	Share a ride to work	Use xeriscaping	Bicycle to work	Use grey water for watering the lawn	Use public transport	Drive a hybrid car
Amenity migrant	93%	88%	66%	45%	44%	43%	23%	19%	20%	7%	7%	4%	0.7%
Economic migrant	97%	89%	60%	51%	35%	38%	24%	27%	22%	11%	3%	5%	0%
Returned resident	90%	100%	80%	50%	50%	60%	10%	10%	10%	0%	0%	0%	0%
Local person	67%	76%	62%	33%	38%	48%	24%	19%	14%	5%	5%	5%	0%

Breaking down the responses by resident type yielded the following results:

- Amenity migrants generally indicated they practiced environmental conservation. Although they only led in 2 environmental conserving practices out of the total 13 (use of grey water and hybrid car), they participated in all 13 activities. Also, their level of participation was always a few percentage points lower than the leading resident type, economic migrants.

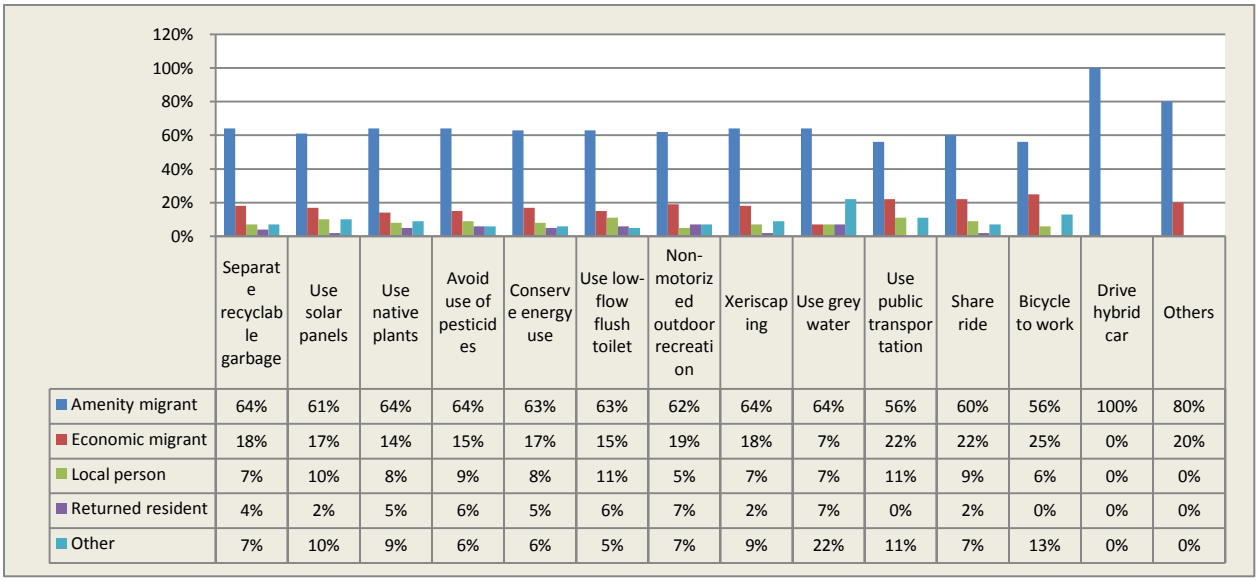
- Economic migrants were the most conserving among the four resident types for the 13 activities considered. In addition, they led in all transportation-related practices (*share a ride to work, bicycle to work*, and *use of public transport*), except for *use of the hybrid car*. They led not only in the most familiar ones (*separate recyclable garbage* and

conserve household energy use), but also less familiar, such as *use xeriscaping*, and a more costly one; *use of solar panels or wind energy*.

- The returned residents led in familiar conservation activities, such as *conserving household energy use*, *avoiding the use of pesticides and chemical fertilizers* and the semi-familiar ones: *low flush toilet* and *use of native plants*. Their level of participation was considerably lower in activities that were costly such as solar panels. Further, they were the only resident type that did not *bicycle to work*, *use public transport*, and *grey water for watering the lawn*.

- Local born and raised residents' level of participation in environmental practices was the lowest among the resident types.

Figure 15. Environmental Conservation Practices by Activity



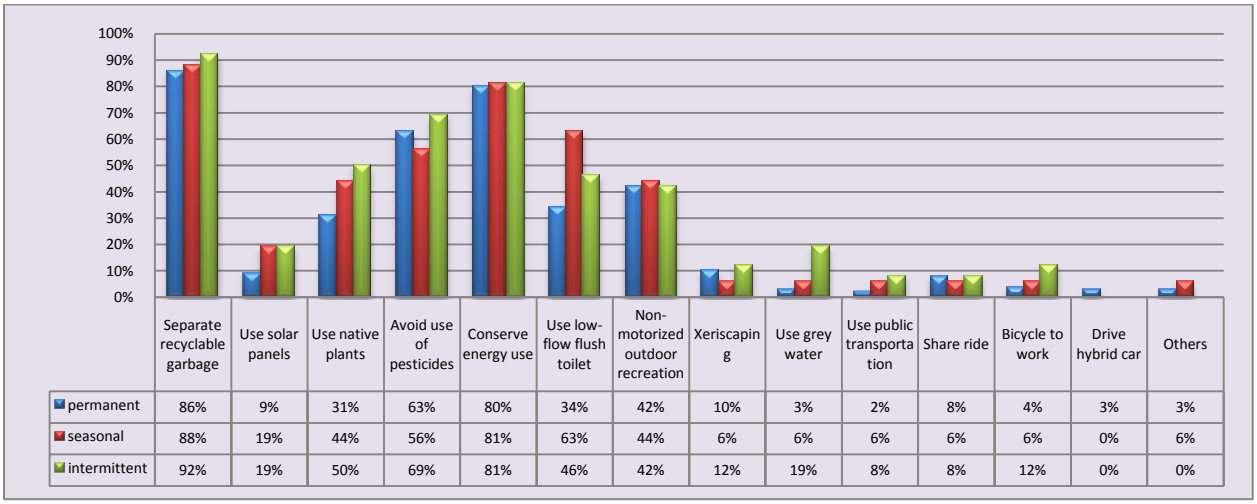
	Separate recyclable garbage	Use solar panels	Use native plants	Avoid use of pesticides	Conserve energy use	Use low-flow flush toilet	Non-motorized outdoor recreation	Xeriscaping	Use grey water	Use public transportation	Share ride	Bicycle to work	Drive hybrid car	Others
Amenity migrant	64%	61%	64%	64%	63%	63%	62%	64%	64%	56%	60%	56%	100%	80%
Economic migrant	18%	17%	14%	15%	17%	15%	19%	18%	7%	22%	22%	25%	0%	20%
Local person	7%	10%	8%	9%	8%	11%	5%	7%	7%	11%	9%	6%	0%	0%
Returned resident	4%	2%	5%	6%	5%	6%	7%	2%	7%	0%	2%	0%	0%	0%
Other	7%	10%	9%	6%	6%	5%	7%	9%	22%	11%	7%	13%	0%	0%

6.6.1.2 Comparison of Environmental Conservation Practices Of Amenity Migrant Types

Existing information about amenity migration in high amenity rural areas suggests their environmental behaviour differs based on their type of residence: permanent, seasonal and intermittent (with the latter two also referred to as second home owners or multi-resident dwellers). What is the situation in the Similkameen Valley?

Fig. 16. shows that part-time (seasonal and intermittent) amenity migrants led in 11 out of 13 environmental conservation practices, which indicates they were more resource-conserving than permanent amenity migrants. Further, breaking down the part-time amenity migrants into seasonal and intermittent shows that intermittent amenity migrants led in 8 out of 11 activities, which suggest they were more environmentally conserving than the seasonal amenity migrants.

Figure 16. Similkameen Valley Environmental Conservation Practices by Amenity Migrant Type



	Separate recyclable garbage	Use solar panels	Use native plants	Avoid use of pesticides	Conserve energy use	Use low-flow flush toilet	Non-motorized outdoor recreation	Xeriscaping	Use grey water	Use public transportation	Share ride	Bicycle to work	Drive hybrid car	Others
permanent	86%	9%	31%	63%	80%	34%	42%	10%	3%	2%	8%	4%	3%	3%
seasonal	88%	19%	44%	56%	81%	63%	44%	6%	6%	6%	6%	6%	0%	6%
intermittent	92%	19%	50%	69%	81%	46%	42%	12%	19%	8%	8%	12%	0%	0%

6.6.1.3 Respondents Attributes Influencing Environmental Conservation

The findings (Fig. 13), indicate that out of 13 environmental conservation practices only 3 had more than 50% of all respondents' participation: 1) *Separate recyclable garbage* (91%); 2) *Conserve household energy use* (87%); and 3) *Avoid use of pesticides and chemical fertilizers* (64%). What are the factors that influence most respondents' environmental conservation? Is it age, education, household type, employment, income, or reason for living in or moving to the Valley? The survey's income data seems unreliable, so it can not be included here.

To answer this question an odds-ratio analysis was conducted (Appendix A, Table 2). It shows that:

- In general, age and reasons[17] for residence in the Valley were the most important factors affecting respondents' environmental conservation behaviour. Employment and

[17] Not all *reasons for coming and/ or living in the Valley* (see Table 5) were found significantly important for a respondent to participate in *environmental conservation practices* (see Fig.

household type correlations were found insignificant. Education was a significant factor for only one environmental action/practice, *Avoid use of pesticides*.

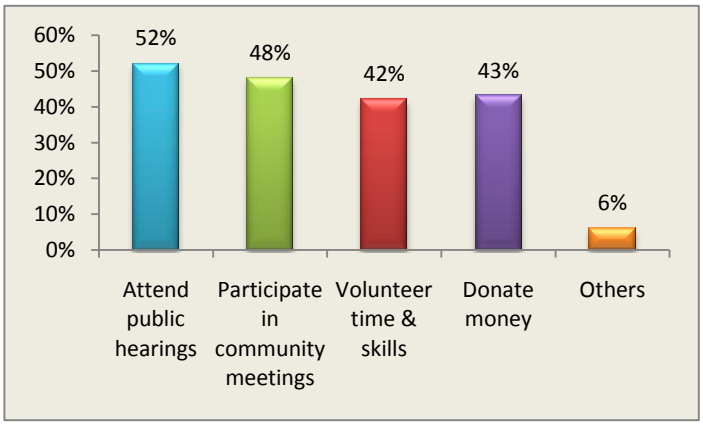
- Age was an important factor for 9 environmental practices — the older the respondent the less likely s/he would do the following: 1) *separate recyclable garbage*; 2) *use native plants*; 3) *conserve household energy*; 4) *use low-flow flush toilet*; 5) *use low impact or non-motorized forms of outdoor recreation*; 6) *use xeriscaping*; 7) *use grey water for watering the lawn*; 8) *share ride to work*; and 9) *bicycle to work*.

- The age factor may help explain why economic migrants were found to be more resource-conserving than amenity migrants. Economic migrants were younger than amenity migrants: median age of economic migrants was 57 years old, compared to 64 for amenity migrants. This also suggests why part-time amenity migrants, particularly the intermittent ones, were more environmentally resource-conserving compared to permanent amenity migrants. The median age of permanent amenity migrants was 68 years old, compared to 58 years old for seasonal amenity migrants and 56 years old for intermittent amenity migrants.

6.6.2 Community Participation

The survey findings (Fig. 17) indicate that the over-all level of respondents' participation to resolving community issues was lower than their environmental conservation practices (Fig.14). Only one action "*Attend public hearings"* had more than 50% of respondents' participation.

Figure 17. Similkameen Valley Respondent Participation for Resolving Community Issues



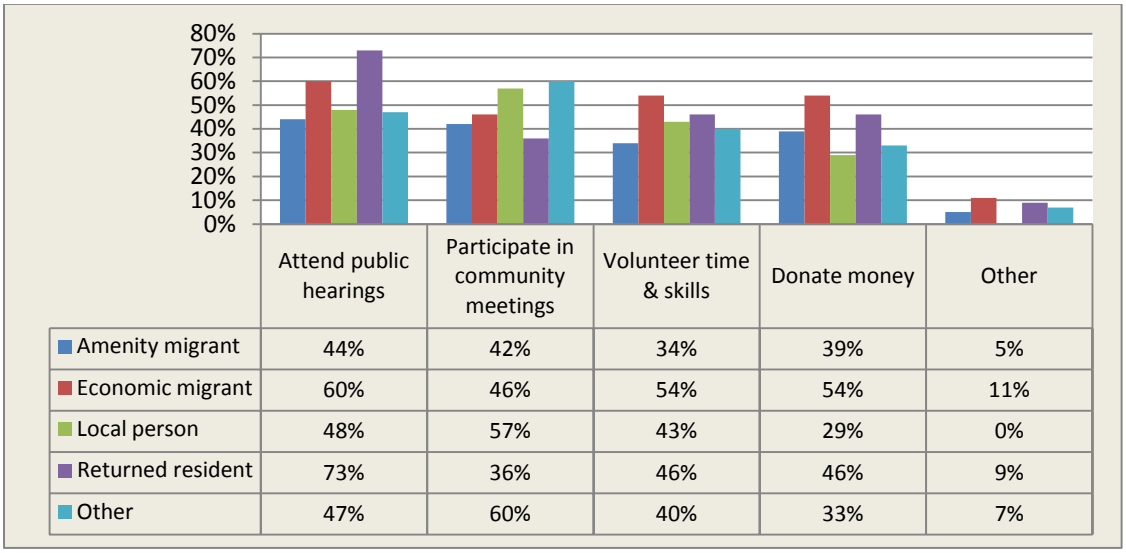
14). For complete list of significantly important *reasons* for *environmental conservation practices* see Appendix A, Table 2.

6.6.2.1 Community Participation by Resident Types

The survey findings (Fig. 18) indicate that:

- Amenity migrants participated less in the community compared to other types of Valley residents.
- Economic migrants participated the most.

Figure 18. Community Participation by Resident Type



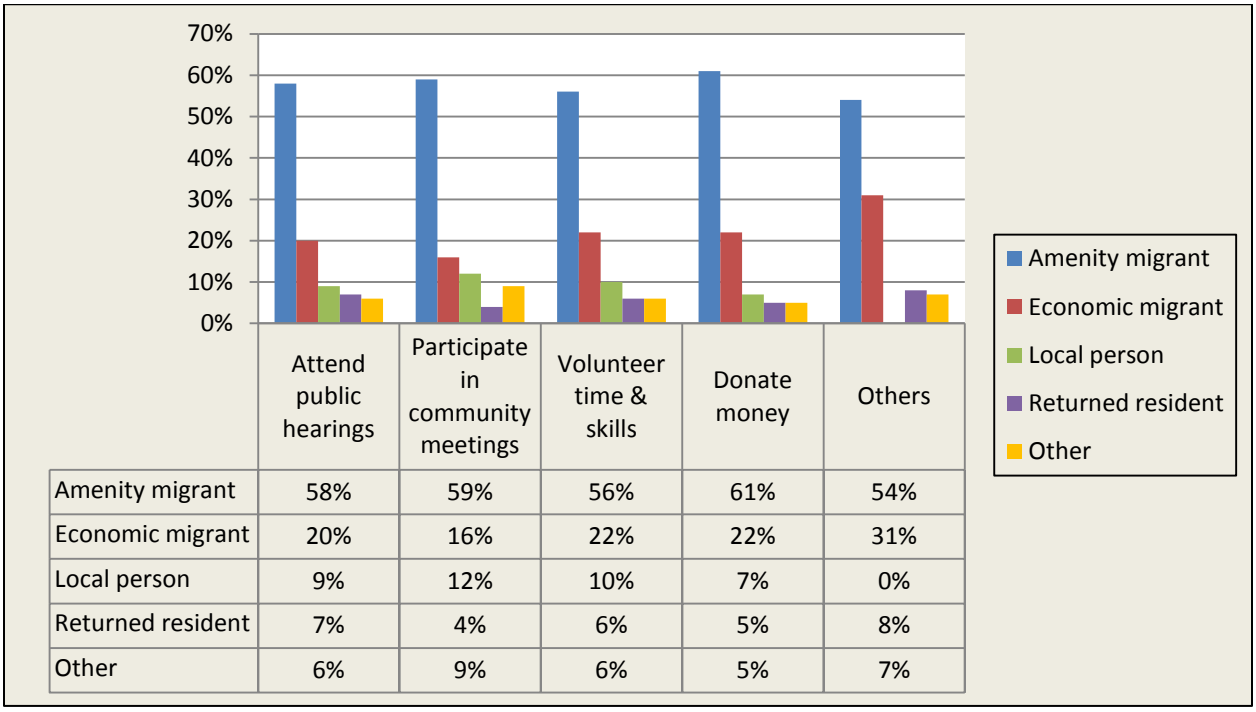
	Attend public hearings	Participate in community meetings	Volunteer time & skills	Donate money	Other
Amenity migrant	44%	42%	34%	39%	5%
Economic migrant	60%	46%	54%	54%	11%
Local person	48%	57%	43%	29%	0%
Returned resident	73%	36%	46%	46%	9%
Other	47%	60%	40%	33%	7%

This lower participation gives us some insight into why some respondents considered amenity migrants as a threat. The following are examples of household survey respondent's verbatim answers of why amenity migration is a threat.

- *Amenity migrants often have a different view of the future of the Valley as compared to long time residents. Amenity migrants often attempt to impose their biases and baggage onto their adopted neighbours.*
- *People bring their bad city habits and attitudes, which don't integrate with the country attitude.*
- *Some may try to change the area to greater reflect where they came from originally.*
- *They seem to want to change our way of life to suit theirs.*

However, similar with environmental conservation practices, due to being a much higher percentage of the population, the amenity migrants through these 5 indications of participation, likely have greater effects compared to any other resident type (see Fig. 19).

Figure 19. Community Participation By Type of Activity



	Attend public hearings	Participate in community meetings	Volunteer time & skills	Donate money	Others
Amenity migrant	58%	59%	56%	61%	54%
Economic migrant	20%	16%	22%	22%	31%
Local person	9%	12%	10%	7%	0%
Returned resident	7%	4%	6%	5%	8%
Other	6%	9%	6%	5%	7%

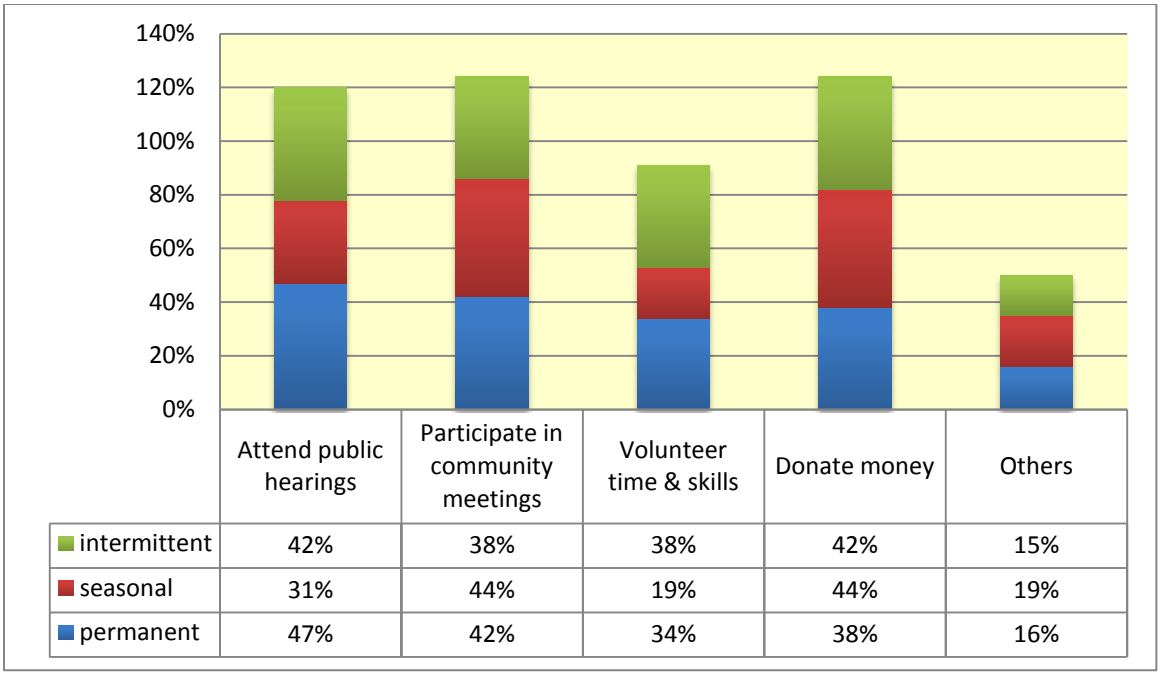
6.6.2.2 Community Participation of Amenity Migration Types

Volunteerism is generally considered crucial to the social, economic and environmental sustainability of rural communities. With increasing amenity migration the role of these migrants in their destination communities has become a significant concern. The little research undertaken on this subject is inconclusive. However, in some communities there is a belief, also reflected in some literature on amenity migration, that part-time amenity migrants (seasonal and intermittent) participate little in the affairs of the communities where they have their second homes or holiday cottages.

In the household survey 18% respondents identified themselves as part-time amenity migrants. This is a significant number; 2% higher than economic migrants and twice the number of local people (Fig. 6). Therefore, the following analysis was undertaken.

Overall part-time amenity migrants participated in community decision-making to resolve issues, and in some activities did so more than permanent amenity migrants (Fig. 20). This is especially true with intermittent amenity migrants. At the same time they were a few percentage points less than permanent amenity migrants in activities that had a set date, such as public hearings and community meetings.

Figure 20. Level of Community Participation by Amenity Migrant Type

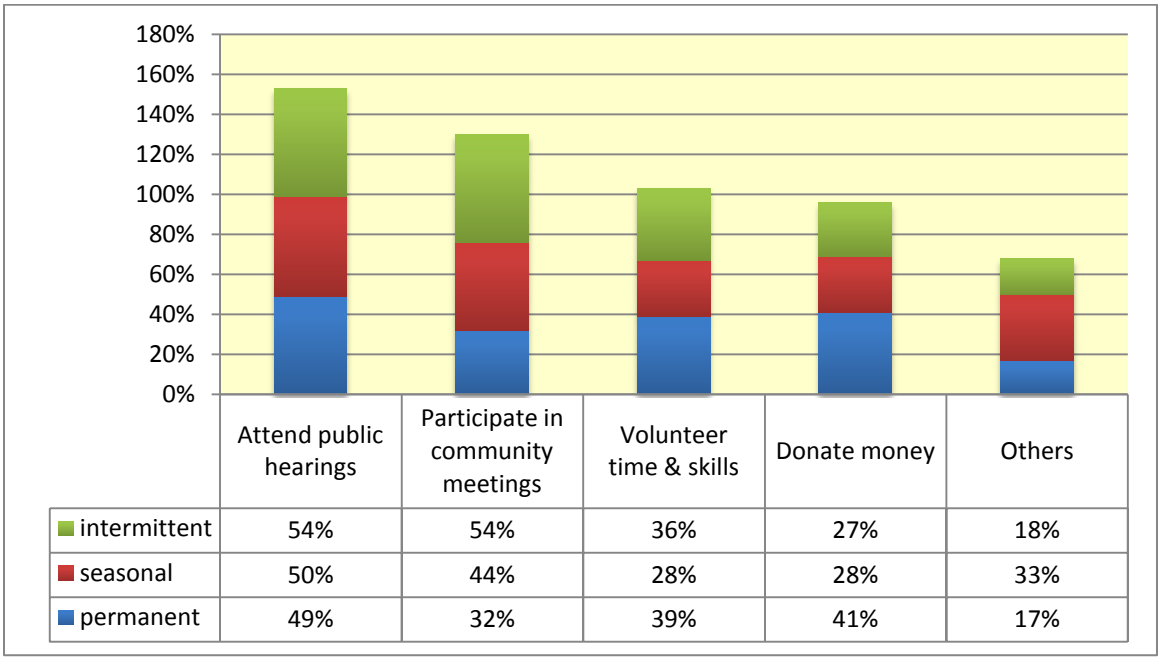


	Attend public hearings	Participate in community meetings	Volunteer time & skills	Donate money	Others
intermittent	42%	38%	38%	42%	15%
seasonal	31%	44%	19%	44%	19%
permanent	47%	42%	34%	38%	16%

To see whether there is a difference when compared to a geographic area with a seemingly more advanced phase of amenity migration development, the same analysis was undertaken for the South Okanagan Valley (Fig. 21).

In the South Okanagan Valley, part-time amenity migrants, especially the intermittent ones, also participated in community decision-making, and in some activities, similar to Similkameen, considerably more than permanent amenity migrants. A seeming difference between Similkameen and South Okanagan was for part-time amenity migrants participating more in activities undertaken at a set date and place: public hearings and community meetings. Similkameen and South Okanagan showed the opposite tendency.

Figure 21. Community Participation by Amenity Migrant Type In South Okanagan Valley



	Attend public hearings	Participate in community meetings	Volunteer time & skills	Donate money	Others
intermittent	54%	54%	36%	27%	18%
seasonal	50%	44%	28%	28%	33%
permanent	49%	32%	39%	41%	17%

6.6.2.3 Respondents Attributes Influencing Community Participation

Similar to environmental conservation practices above, the attributes of age, education, employment, household type and reasons for coming to or living in the Valley were correlated with 5 community participation activities to resolve issues to determine which attribute(s) were most important (Appendix A, Table 3). The following seems most relevant to the project's objectives:

- Age, reasons for migration, employment, and education were found the most significant attributes for participation.
- Household type was found insignificant.
- Out of the four reasons amenity migrants were disadvantaged by three because they were older, non-employed (retired) and higher educated. The last one seemed surprising because it is commonly thought that if amenity migrants have a higher level of educational attainment, compared to other resident types (see Section 6.2) particularly in post graduate studies, their participation should be high. But it was low.

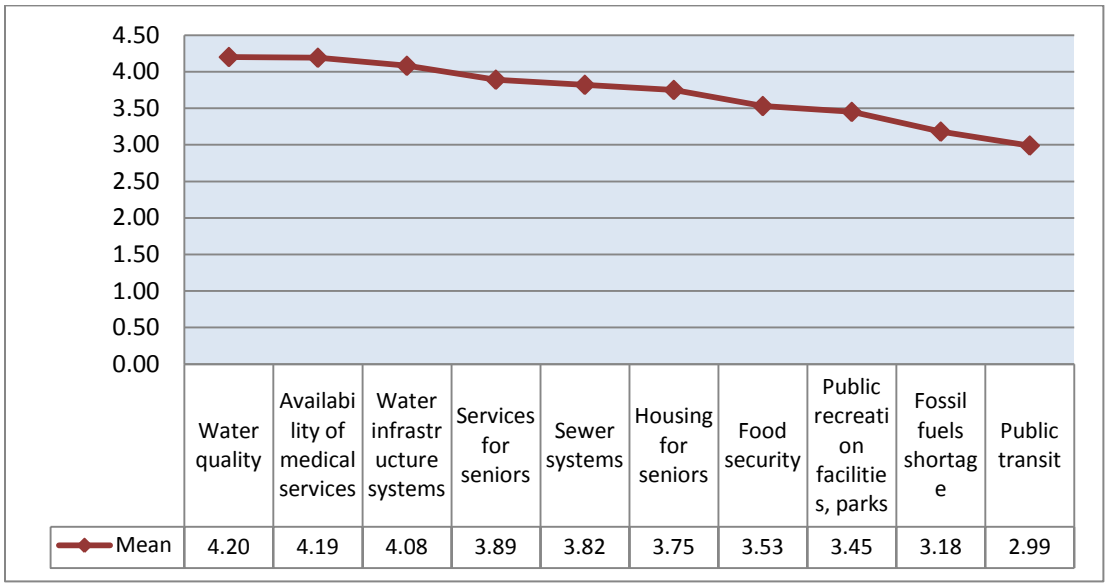
6.3 Perception of Social, Economic and Environmental Issues

6.3.1 Key Valley Future Issues

In the random household survey, respondents were asked to rate in a scale of minor to major[18] key issues the Valley may face in the next 20 years. A *one-way analysis of variance* called *ANOVA* was used with the following main results:

- Out of 28 key issues that the *Valley may face in the next 20 years* 10 were found to be statistically significant[19]. Water quality was identified as the most important future problem, followed by availability of medical services. See Fig. 22 for other 8 issues ranking.

Figure 22. Statistically Significant Key Issues the Valley May Face in the Next 20 Years



	Water quality	Availability of medical services	Water infrastructure systems	Services for seniors	Sewer systems	Housing for seniors	Food security	Public recreation facilities, parks	Fossil fuels shortage	Public transit
Mean	4.20	4.19	4.08	3.89	3.82	3.75	3.53	3.45	3.18	2.99

[18] The *Lickert-Type Rating of* 1 to 5 (1 minor and 5 major) was used to measure the respondents' responses.

[19] Some of the issues identified here are different from those reported in the *Technical Report* (Appendix B) due to the use here of a more representative statistical tool. The earlier report did not consider if the differences among the means were statistically significant, meaning the differences were likely *not* by chance occurrence.

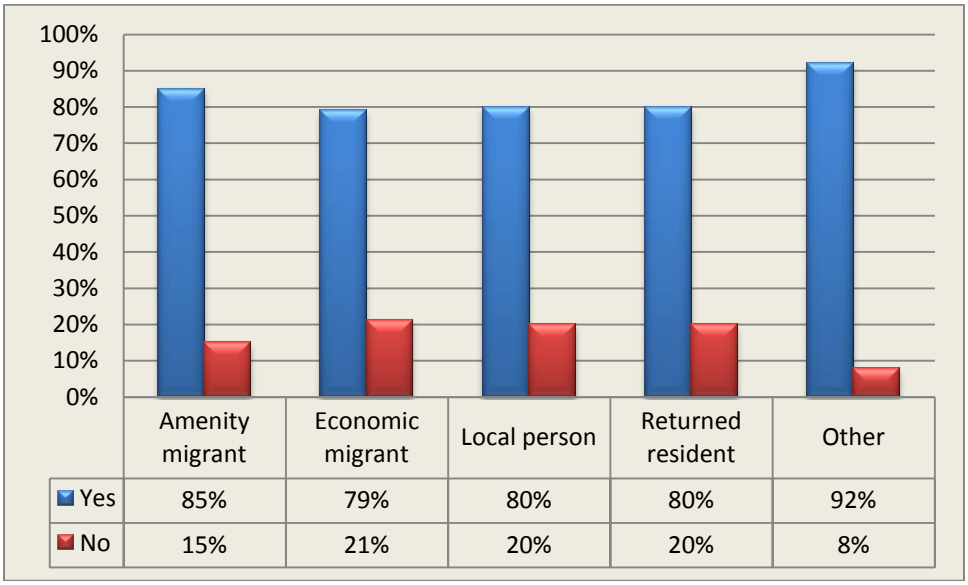
In addition to identifying issues that are most significant, the most important issues were also identified for each resident type:

- Amenity migrants: 1) *Services for seniors,* 2) *Housing for seniors,* 3) *Availability of medical services*, and 4) *Food security.*
- Economic migrants: 1) *Water quality*, 2) *Water infrastructure systems*, 3) *Public transit*, and 4) *Fossil fuel shortage.*
- Returned residents: 1) *Sewer systems*, and 2) *Public recreation facilities, parks*
- Local persons*:* There were no statistically significant key issues that local persons thought of major importance in the future. Also, the analysis indicated that this resident type would participate less on the following issues: 1) *Fossil fuel shortage*, 2) *Public transit*, 3) *Public recreation facilities*, 4) *Sewer systems*, and 5) *Food security*.

6.3.1.1 Capability and Will of Local Government

When asked if the local government in the Valley needs to do more regarding the above key issues they identified, 84% of total respondents stated *Yes*. In addition, the responses across resident types were fairly similar (Fig. 23).

Figure 23. Local Government Needs to Do More about Valley Key Issues



	Amenity migrant	Economic migrant	Local person	Returned resident	Other
Yes	85%	79%	80%	80%	92%
No	15%	21%	20%	20%	8%

When asked which top 3 key issues local government should give most attention to, only 16% (38 respondents) of the total household respondents answered this question. The top 3 were *Air quality, Water quality,* and *Available medical services.*

However, when it came to the opinion of resident types on whether or not local government has the planning, management and financial capability to address the top 3 issues identified above, there was a large difference in opinions among resident types. Of the 24% of respondents who thought local government was capable (Fig. 24), 43% came from local persons, 24% from amenity migrants, 12% from economic migrants, and 10% from returned residents (Fig. 25). But, only 49% of respondents had a definite answer to the question (Fig. 24) which represents 8% of the total survey respondents.

Figure 24. Local Government Capability to Address Valley Key Issues

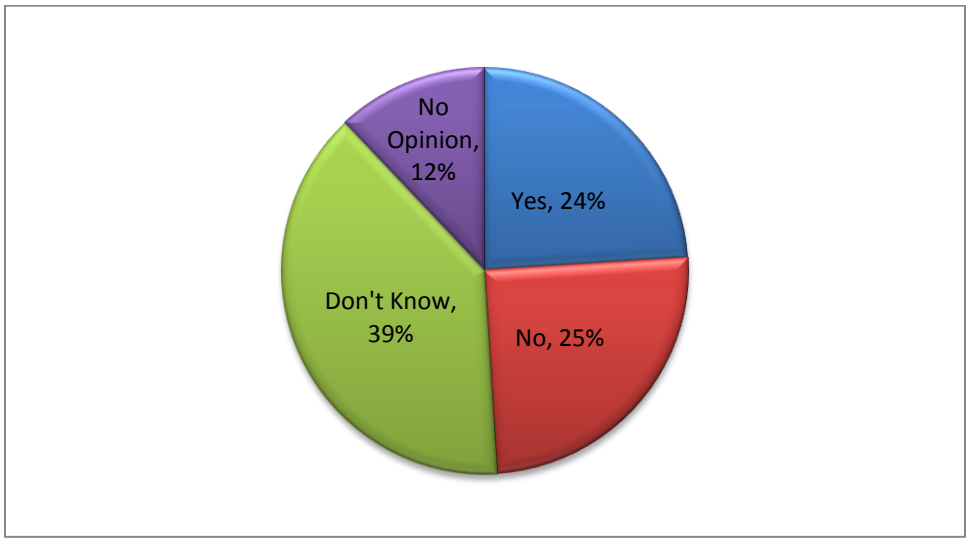
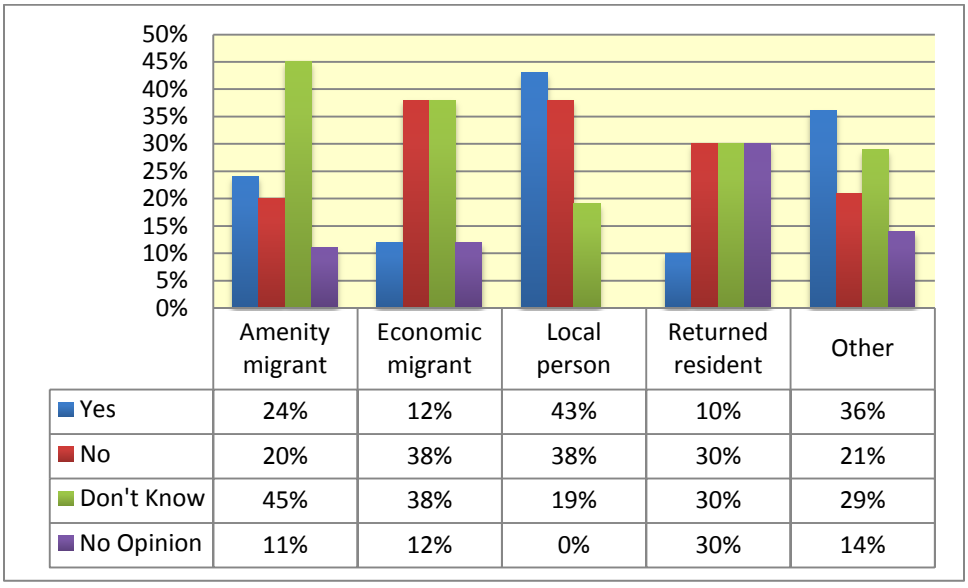


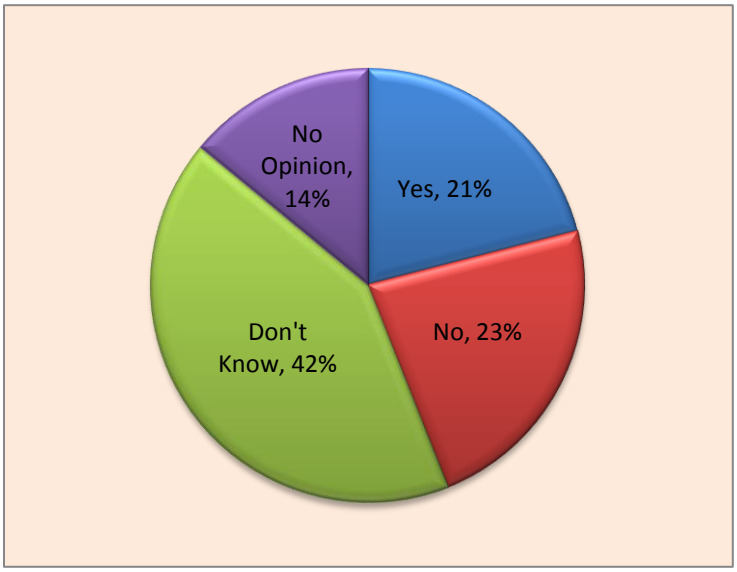
Figure 25. Local Government Capability to Address Valley Key Issues by Resident Type



	Amenity migrant	Economic migrant	Local person	Returned resident	Other
Yes	24%	12%	43%	10%	36%
No	20%	38%	38%	30%	21%
Don't Know	45%	38%	19%	30%	29%
No Opinion	11%	12%	0%	30%	14%

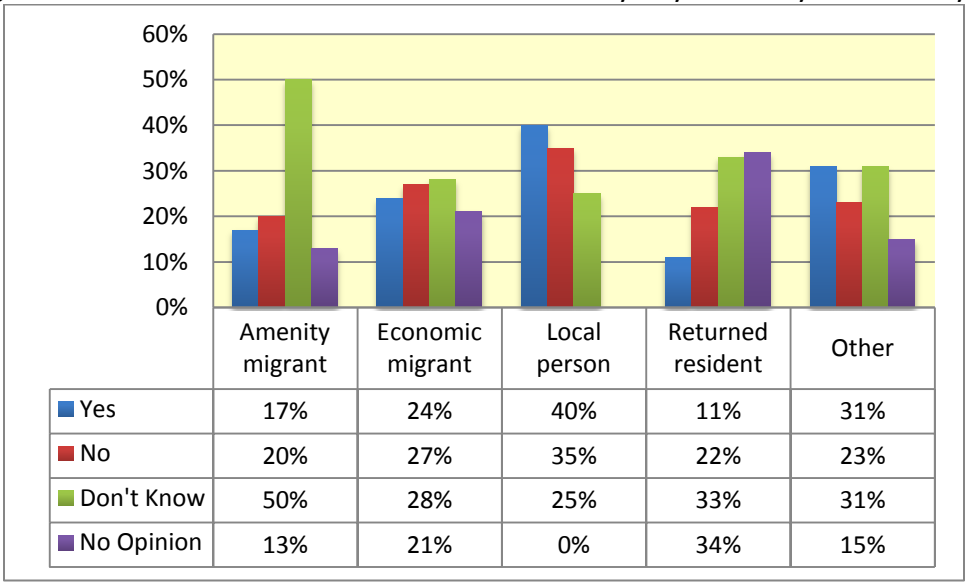
Regarding whether or not local government has *the will* to act on the top 3 issues the respondents identified, there was more uncertainty. Fig. 26 shows that only 21% of total respondents thought local government had this *will* and 23% thought not. However, only 44% of respondents had a definite answer to this question (which constitutes 7% of total survey respondents).

Figure 26. Local Government's *Will* to Act on Valley Key Issues



Regarding differences in opinion about the will of local government among resident types. Forty percent of local persons thought local government has *the will* to address the Valley future key issues they identified, as compared to 17% of amenity migrants, 24% for economic migrants, 11% for returned residents and 31% for others (Fig. 29).

Figure 27. Local Government's *Will* to Act on Valley Key Issues by Resident Type



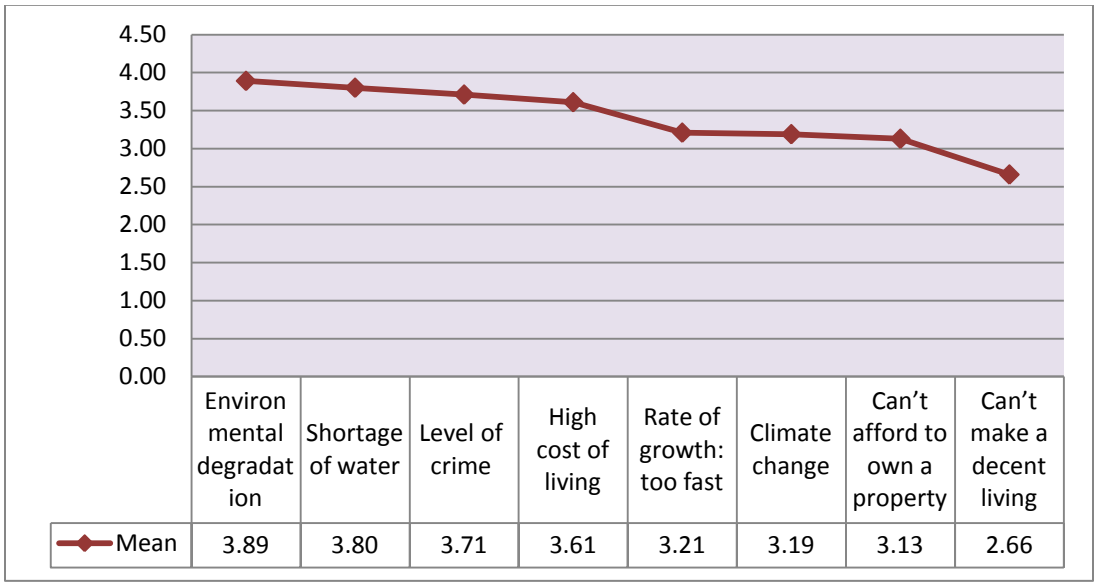
	Amenity migrant	Economic migrant	Local person	Returned resident	Other
Yes	17%	24%	40%	11%	31%
No	20%	27%	35%	22%	23%
Don't Know	50%	28%	25%	33%	31%
No Opinion	13%	21%	0%	34%	15%

6.3.2 Quality of Life Issues

Similar to *Valley* Future *Issues* (Section 6.3.1) ANOVA was used with the following main results:

Out of 12 social, economic and environmental conditions that may decrease survey respondents' *quality of life*, 8 issues were found statistically significant (Fig. 28; for complete results of the analysis see Appendix A, Table 5). Overall, the most important was *Environmental degradation*, followed by *Shortage of water.*

Figure 28. Statistically Significant *Quality of Life* Issues



	Environmental degradation	Shortage of water	Level of crime	High cost of living	Rate of growth: too fast	Climate change	Can't afford to own a property	Can't make a decent living
Mean	3.89	3.80	3.71	3.61	3.21	3.19	3.13	2.66

- Both amenity and economic migrants, unlike local people thought *Level of crime*, *Shortage of water*, and *Environmental degradation* would decrease their *quality of life*.
- *Can't afford to own a property* and *Can't make a decent living* were more important *quality of life* issues for economic migrants compared to their importance for local people and amenity migrants, respectively.
- *Climate change* and *Rate of growth: too fast* were significantly more important to amenity migrants when compared to their importance for local people and economic migrants, respectively.
- Local persons thought *High cost of living* was a more important *quality of life,* issue compared to amenity migrants.

The respondents were also asked what quality of life issues could cause them to leave the Valley.

- Most significant for amenity migrants were: *Level of crime*, *Shortage of water*, *Environment degradation*, *Can't afford to own a property*, and *Lack of health care facilities.*
- Economic migrants compared to other resident types are more likely to leave the Valley because of: *Can't make a decent living, Level of Crime, Environmental degradation* and *Lack of health care facilities.*
- Local persons are more likely to leave the Valley due to *Can't make a decent living.*
- Returned residents did not indicate that any of the issues would cause them to leave the Similkameen.

7.0 Economic Effects and Housing Implications

Of all the effects of amenity migration, its economic ones are the most studied to date. Bearing in mind that most of this information is about the western US mountain region, it indicates that in some high amenity rural places, amenity migrants have brought and created new and more diversified economic activity. The *combination of amenity-led migration and a new economic base has created what some call a 'New West'* (Nelson, 2006: 58). Included are self-employment and some jobs for others, especially significant in places that experienced diminishing forestry or mining. Parallel, there is indication that amenity migration may reduce some regional out-migration of earlier inhabitants.

Amenity migrants may or may not earn a living in their high-amenity location. A considerable percentage of them obtain income from elsewhere in the form of investment returns or transfer payments (especially pensions). When earning an income locally, they are frequently plugged into the information or knowledge-based economy, and the linked creativity and arts economy; the *New Economy*. They own the enterprise or occupy the higher paying jobs in the late modern sector of the economy, along with professional positions of related activities, as they have the appropriate knowledge, orientation and capital. But also many have more mundane jobs, such as construction workers, store and gallery assistants, restaurant waiters, and often have several part time jobs. Characteristically amenity-led migrants derive income from tourism and amenity migration service activities, the primary driver typically being real property development. A common result of this *development*, increasing unaffordability of local housing, appears to be a principal socio-economic problem resulting from amenity migration. (See especially *Chipeniuk*, 2006, *Clark et al*., 2006, *Green et al.,* 2005, *Johnson* and

Rasker, 1995; *Johnson et al.,* 2003, *Löffler* and *Steinicke*, 2006, *Moss*, 1994, 2006, *Rasker* and *Alexander*, 1997, 2003).

Do Similkameen Valley amenity migrants create more jobs compared to other resident types? More generally, is there a similar amenity migration effect in the Valley to that described above? The following are the main related findings:

Amenity migrants have had limited economic effects in the Valley, especially compared to economic migrants[20]. However, this finding from the household survey may understate the existing condition as the survey did not develop information about amenity migrants' purchase of local goods and services.

- Compared to economic migrants, amenity migrants were 94% less likely to move to a place for business opportunity.[21]
- Only 12% of amenity migrants started up a business in the Valley compared to 56% of economic migrants, 59% of local people and 20% of returned residents.
- The median business investment of economic migrants ($150,000) was three times that of amenity migrants ($50,000), twice of returned residents ($75,000) and 2.5 times that of local persons ($60,000)[22].

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[20] The above findings are not consistent with earlier analysis of amenity migrants' contribution to the Valley's economy, particularly the SVPS summary report (May 2008). Earlier analysis did not use inferential statistical analysis. Further, one significant data that can help determine amenity migrants' economic contribution was highly questionable: total business investments made by each resident type. Based on the survey, the total investment of amenity migrants in Similkameen Valley was $162,065,000, or 98% of the total respondents' business investment in the Valley. Going back to the database we found that there was an entry for one amenity migrant living in Keremeos with $160,000,000 investment in Keremeos. It is most likely that there was no single business in Keremeos that was worth $160M in 2006. The available data for comparison was the 2004's Similkameen Valley's NAICS annual gross sale where forestry's annual gross sale was about $60M. Based on the survey, economic migrants' total investment in 2007 was $2,843,000, $150,000 for returned residents, and $120,000 for local persons.

[21] This finding is consistent with another regression analysis done on sources of income of all resident types. It shows that compared to economic migrants, amenity migrants are 95% less likely to think that they can move to a place because they are business persons who could settle in several places.

[22] Earlier analysis (Technical Report in Appendix B) used averages which is inappropriate for particularly this case. Due to one amenity migrant reporting a $160,000,000 investment in Keremeos, the average amenity migrant investment was $16,206,500, which quite distorted the finding.

- Economic migrants employed 2.7 times more employees than amenity migrants; 40 times more than returned residents, but 7% less than local persons.
- Only 11% of amenity migrants were self-employed compared to 31% of economic migrants.
- Amenity migrants most important source of income was their pension, and not earnings from capital and investments. Forty-two percent of amenity migrants depend on their pension compared to 12% of economic migrants. Only 5% of amenity migrants derived their income from business compared with 27% economic migrants.

The main economic industries (NAICS) in the Valley did not indicate a shift to a *late-modern* economy or *New Economy*, which advanced amenity migration locations like Santa Fe, New Mexico, and other Rocky Mountain communities typically have (see especially Shumway and Otterstrom 2001). This was reflected in the economic activities of the amenity migrants' (above) and in the 2004 NAICS annual gross sale in the Valley. Bearing in mind the date of this information, see especially the starred (*) categories.

Table 6. 2004 Annual Gross Sales by NAICS Sector in Similkameen Valley

NAICS Sector	Annual Gross Sales
Forestry	59,075,000
Retail Trade	38,100,000
Agriculture	21,237,500
Accommodation/ Food Service*	16,500,000
Manufacturing	14,000,000
Educational Services*	12,662,500
Wholesale Trade	11,337,500
Construction	8,862,500
Health Care and Social Assistance	6,125,000
Other Services *	5,550,000
Real Estate/ Rental/ Leasing *	3,837,500
Public Administration	3,250,000
Transportation/Warehousing	2,137,500
Finance/ Insurance *	2,125,000
Utilities	2,000,000
Professional/ Scientific/ Technical *	1,862,500

How do the above amenity migrants' economic effects differ from those of neighbouring South Okanagan (SO), where amenity migration is considered to be more developed? The regression analysis shows although economic migrants still created more jobs

in South Okanagan compared to its amenity migrants, amenity migrants in SO created more jobs compared to amenity migrants in the Similkameen (S) Valley. The following are other differences:

- 7% more of the SO amenity migrants had started up a business than in S Valley.
- Median business investment of SO amenity migrants was 20% greater than in S Valley.
- SO amenity migrants employed 2.7 times more employees than their S counterparts.
- There were 3% more self-employed amenity migrants in SO than in S.
- There were 3% more SO amenity migrants who derived their income from their business compared to S.
- 31% more SO amenity migrants migrated due also to business opportunity than their S counterparts.

Housing Implications

There was a high correlation between the increased amenity migration for the 2001-2006 period with the increase in real estate values during the same period. With the use of a *Wilcoxon signed-rank test*[23] it was determined that the median value of real estate in the Valley had more than doubled (from $140,000 to $300,000) from 2001 to 2006. This result is consistent with housing value increases in other high-amenity mountain places (*Ireland* 2006, *Glorioso* and *Moss* 2006, *Glorioso* 2009), which *Ireland* 2006 warned may be a welcome change in the early phase of amenity migration development, but may result to out-migration of younger and middle class populations as housing becomes increasingly unaffordable.[24]

Housing affordability is decreasing (Table 7.). The average value of a dwelling in the Valley increased from 2001 to 2006 by 45% (from $122,039 to 269,248), while median household income increased by 52%. However, in most places, the percentage increase in

[23] p-value was <0.001.

[24] Other analysts (*Bland* 2009, *Clark* 2006, and *Johnson et al* 2006) all agreed that where amenity migration is most advanced, the decline in housing affordability, for both purchase and rent, has become an outstanding public policy issue. On the other hand, *Hammer* and *Winkler* 2006 suggest that high amenity communities have better opportunities to address their affordable housing issue compared to other rural communities where this problem stem from long-term decline and neglect. They propose that high amenity places have a larger tax base and through land use controls can require land developers to provide affordable housing.

household income was much lower than the percentage increase in dwelling unit value. For example, the dwelling value in Princeton increased by 55%, while median household income increased by only 21%. In addition, in some places in the Valley, Area B in particular, the average dwelling value of $404,525 was only 3.5% lower than BC's average dwelling value in 2006 ($418,703). However, Area B's median household income was 34% lower than BC's median household income.

Table 7. Housing Affordability in Similkameen Valley (Correlated with Median Income)

Area	2006 Dwelling Average Value ($)	2001 Dwelling Average Value ($)	% Change from 2001 to 2006	2006 Median Household Income ($)	2001 Median Household Income ($)	% Change from 2001 to 2006	% of **Renters** paying ≥ 30% of household income on housing (2006)	% of **Owners** paying ≥ 30% of household income on housing (2006)
Area B	404,525	143,981	64%	39,468	25,610	54%	33%	36%
Area G	182,522	96,357	47%	33,122	24,525	35%	46%	16%
Area H	323,374	170,437	47%	49,967	39,939	25%	20%	23%
Keremeos	189,628	102,305	46%	34,171	22,110	54%	49%	16%
Princeton	246,194	97,115	55%	38,826	32,094	21%	49%	16%
Total	**269,248**	**122,039**	**45%**	**38,826**	**25610**	**52%**	**38%**	**20%**

Note: 2006 BC average dwelling value was $418,703; and
2006 BC median household income was $52,709.

8.0 Similkameen Valley Amenity Migration: Opportunity or Threat?

The majority of the 15 key informants interviewed thought amenity migration was definitely an opportunity, but only in the context of amenity migration being appropriately planned and managed. Otherwise, cost of living increases while most incomes remain low or fixed, and uncontrolled population growth would result in negative environmental and socio-economic issues, such as unaffordable land and housing and a general decrease in the social and environmental *quality of life*.

The key informants had more definitive opinion than respondents to the household survey on whether amenity migration was an opportunity or a threat. The latter had more cautious, or perhaps more uninformed, or less informed opinions. Forty-six (46%) of survey respondents had no opinion on the matter, while 39% thought it is an opportunity, 12% a threat, and 3% both (Fig. 29). There were no significant differences in opinion among amenity, economic and local resident types. But there was a difference in opinion between the returned

residents and the previous three resident types. Only 10% returned residents thought amenity migration is an opportunity and 90% had no opinion (Fig. 30).

Figure 29 Survey Respondents Opinions about Amenity Migration

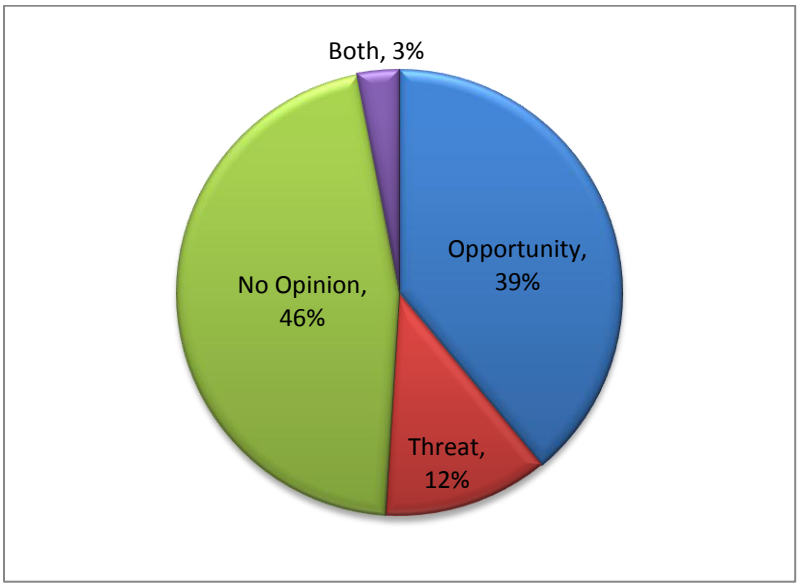
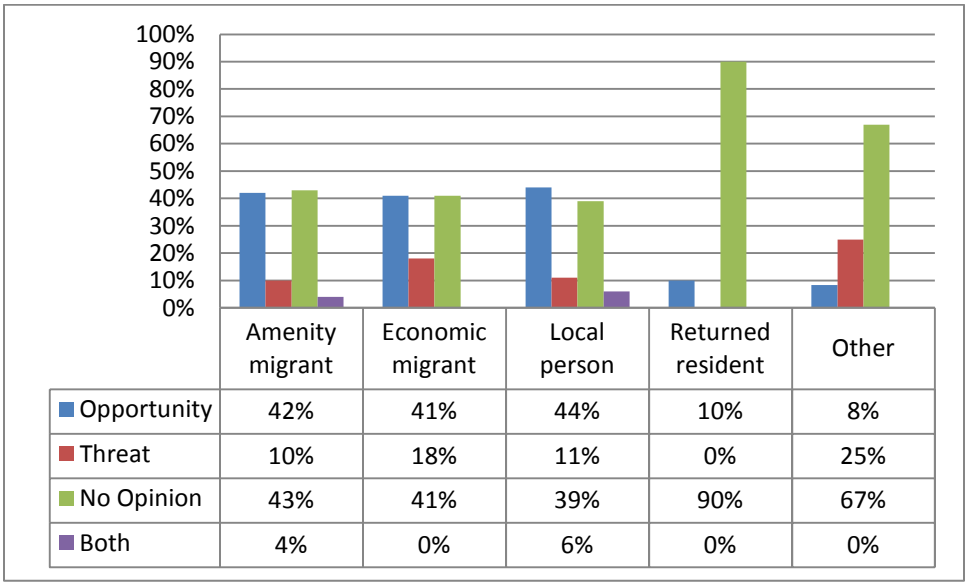


Figure 30 Survey Respondents Opinions about Amenity Migration by Resident Type



	Amenity migrant	Economic migrant	Local person	Returned resident	Other
Opportunity	42%	41%	44%	10%	8%
Threat	10%	18%	11%	0%	25%
No Opinion	43%	41%	39%	90%	67%
Both	4%	0%	6%	0%	0%

What does the global research on the subject say about this? Generally, more studies support the phenomenon as an opportunity, or at least an untapped opportunity, than otherwise. The following are the most common changes needed if the opportunities of the amenity migration phenomenon are to be realized.

- Significantly increase understanding of the amenity migration phenomenon. Especially *Moss* 1994, 2006 and *Ireland* 2006 propose that without clear understanding of the phenomenon's forces and their results, communities will continue to adopt policies and regulations that only address a few symptoms without grappling directly with root causes.

- Where the phenomenon is understood, most communities still need to move beyond to proactive strategy to take advantage of amenity migration's potential benefits while avoiding its threats. Public policy and action have characteristically been quite limited or ineffective, typically *ad hoc* and piece meal attempts to manipulate negative effects of amenity migration and its attendant economic migration. The focus is on marginal manipulations of land use, slowing of the rate of land conversion to human habitation, especially through the quite limited use of public land acquisition and exchange, development regulation and development incentives and provision of affordable housing (*Howe et al* 1997, *Gobster* and *Haight* 2004, *Moss* 2006, *Travis* 2007).

- Too much public policy and planning focus on utopian *visioning* and not enough on *strategy* (*Glorioso* 2009b, *Glorioso* and *Moss* 2006).

- Integrate land use and transportation planning (*Glorioso* 2009b, *Johnson et al* 2006).

- Shift from or integrate into traditional public planning strategic planning, especially using alternative future scenarios to address our complex and unpredictable world (*Glorioso* 2009b, *Glorioso* and *Moss* 2006, *Kemp* 1992, *Moss* 1999, *Kruger et al* 2009).

- Develop and use a set of local quality of life indicators for strategy formulation, monitoring and evaluation (*UN Commission on Sustainable Development* 1996, *Schechter* 2009).

- Improve statistics (and collection frequency) so they reflect the high mobility and multi-residency of our present society (*Chipeniuk* and *Rapaport* 2009, *Hall* and *Muller* 2004, *Moss 2006*).

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Appendix A. Inferential Statistical Analysis Results

Table 1. Comparison of Amenity and Economic Migrants Reasons for Moving to the Valley

Reason for coming	Economic Migrant	Amenity Migrant Odds Ratio (p-value)
Superior Natural Environment		
1. To enjoy clean air	-	**3.10 (0.00)**
2. To enjoy clean rivers and lakes	-	1.79 (0.12)
3. Because of the climate	-	**2.34 (0.02)**
4. Because of mountains and mountain views	-	**5.19 (0.00)**
5. To live in an area of diverse plants/wildlife	-	**4.77 (0.00)**
6. To be near parks	-	2.19 (0.13)
7. To be in farm or ranch country		0.86 (0.77)
Cultural Differentiation		
8. For peace and quiet	-	**4.09 (0.00)**
9. To be in a safer place	-	1.44 (0.35)
10. To live in a rural community	-	1.26 (0.55)
11. To enjoy music or cultural scene	-	NA
12. Because of the wineries	-	0.53 (0.48)
13. Because it is culturally distinct	-	NA
Leisure		
14. To retire	-	**5.01 (0.00)**
15. To prepare for retirement	-	**7.06 (0.00)**
16. To be near abundant outdoor recreational opportunities	-	**2.98 (0.02)**
Leisure (Continued)		
17. Because of diverse outdoor recreational opportunities		**4.66 (0.01)**
18. To be near Crown land for hunting/fishing		**5.20 (0.02)**
19. To be near Crown land for motorized recreation		**8.49 (0.03)**
Economic Gain/ Opportunity		
20. Because of cheaper property		1.02 (0.95)
21. To have a lower cost of living		1.02 (0.94)
22. For a job		**0.56 (0.00)**
23. To pursue a business opportunity		**0.06 (0.00)**
Learning/ Spirituality		
24. Because of spiritual attraction of landscape		2.58 (0.14)
Others		
25. To be close to family or partner		0.91 (0.86)
26. Good facilities for seniors		1.75 (0.25)
27. Because of its comfort amenities (restaurants, shops, entertainment, walk to most services)		
28. Access to health care		

NOTE: How to interpret the above table?

Odds ratio analysis is a way of comparing whether amenity migrants' reasons for moving were the same for economic migrants. An odds ratio of 1 implies that the reason is equally likely important for both amenity and economic migrants. An odds ratio greater than 1 implies that the reason is more likely important for amenity migrants while an odds ratio less than 1 implies that the reason is less likely important for amenity migrants. The results with "p-value" equal or less than 0.05 are marked in blue. P-value indicates the decreasing index of the reliability of the result. The lower the p-value, the higher the significance of its result, and the more it is a "true representative of the population". In many areas of research, p-value equal or less than 0.05 is the typical "border-line acceptable" error level. The column for economic migrant is blank because it is the group with which amenity migrant was compared upon.

Examples of Interpretation:

- The odds ratio for all leisure related reasons (reasons no. 14-18) is more than 1 which means that leisure related reasons are more important to amenity migrants compared to economic migrants. Note that p-values for these reasons are equal or less than 0.05.

- Reason no. 19: *To be near Crown land for motorized recreation* is 8 times more important reason for amenity migrants compared to economic migrants. (p-value 0.03)

- Reason no. 23: *To pursue a business opportunity* is 94% less important reason (odds ratio 1 minus 0.06) to amenity migrants compared to economic migrants. (p-value 0.00)

Table 2. Significant Attributes for Environmental Conservation Practices
(Note: This list contains only statistically significant results)

Environmental Conservation Practice	Factors Significantly Related with Practice	Odds Ratio	p-value
1) Separate recyclable garbage	• Age (younger) • Reasons: 1. To enjoy clean rivers and lakes 2. To be near abundant outdoor recreational opportunities (egs. golf, fishing, skiing) 3. Because of climate	0.38 2.38 1.95 1.60	(<0.001) (<0.001) (0.05) (0.01)
2) Use solar panels/ wind energy	• Reasons: 1. Because of climate 2. Because of mountains and mountain views 3. To be near abundant outdoor recreational opportunities (eg. golf, fishing, skiing)	 2.04 1.65 1.40	 (0.04) (0.02) (0.05)
3) Use native plants	• Age (younger) • Reasons: 1. Because of mountains and mountain views 2. Because of spiritual significance of landscape 3. To enjoy clean rivers and lakes 4. To be near abundant outdoor recreational opportunities (eg. golf, fishing, skiing) 5. To live in an area of diverse plants/wildlife 6. Because of diverse outdoor recreational opportunities (eg. golf, swimming, skiing) 7. To be in a safer place 8. To be near parks	0.74 3.39 1.62 1.50 1.41 1.34 1.33 1.33 1.30	(<0.001) (<0.001) (<0.001) (<0.001) (<0.001) (0.01) (0.02) (0.02) (0.05)
4) Avoid use of pesticides	• Education (Bachelor's) • Reasons: 1. To live in a rural community 2. To enjoy clean rivers and lakes 3. To live in an area of diverse plants/wildlife	4.12 1.42 1.29 1.22	(0.05) (0.01) (0.04) (0.02)
5) Conserve household energy	• Age (younger) • Reasons: 1. To enjoy clean rivers and lakes 2. To enjoy clean air 4. To live in a rural community 3. To be in a safer place 4. Because of the climate	0.48 2.24 1.76 1.56 1.54 1.43	(<0.001) (<0.001) (<0.001) (0.04) (0.02) (0.02)
6) Use of low-flow flush toilet	• Age (younger) • Reason: 1. To be near parks 2. Because of mountains and mountain views	0.62 1.30 1.27	(0.01) (0.05) (0.04)
7) Use low impact or non-	• Age (younger) • Reasons:	0.68	(0.03)

Environmental Conservation Practice	Factors Significantly Related with Practice	Odds Ratio	p-value
motorized forms of outdoor recreation	1. Because of its comfort amenities (restaurants, shops, entertainment, walk to most services) 2. To enjoy clean rivers and lakes 3. To enjoy clean air 4. To be in farm or ranch country 5. To be near parks 6. To live in an area of diverse plants/wildlife 7. Because of the climate 8. To live in a rural community	1.67 1.56 1.40 1.42 1.39 1.33 1.33 1.28	(0.01) (<0.001) (0.01) (0.03) (0.01) (0.01) (0.03) (0.04)
8) Use xeriscaping	• Age (younger) • Reason: 1. Because of spiritual attraction of landscape	0.41 4.0	(<0.001) (<0.001)
9) Use grey water for watering the lawn	• Age (younger) • Reason: 1. To be in farm or ranch country 2. Because of spiritual attraction of landscape	0.40 1.74 1.57	(0.02) (0.02) (0.05)
10) Use public transportation	• Reason: 1. To pursue a business opportunity 2. Because of its comfort amenities (restaurants, shops, entertainment, walk to most services)	 3.06 1.99	 (<0.001) (0.04)
11) Share a ride to work	• Age (younger) • Reason: 1. To pursue a business opportunity 2. For a job	0.37 3.55 1.84	(0.01) (<0.001) (0.04)
12) Bicycle to work	• Age (younger) • Reason: 1. To pursue a business opportunity 2. To be near parks	0.27 2.81 1.74	(<0.001) (<0.001) (0.02)
13) Driving a hybrid car	None		

Table 3. Most Significant Attributes Affecting Respondents Community Participation
(Note: Only statistically significant results are listed here.)

Community Participation Action	Most Significant Attribute	Odds Ratio	p-value
Attend public hearings	• Employed	10	(0.02)
	• Reason		
	1. To enjoy clean rivers & lakes	1.30	(0.04)
Participate in community meetings	• Age (younger)	0.39	(0.04)
	• Education		
	1. Some college	3.75	(0.04)
	2. Bachelor's	4.82	(0.03)
	• Reason		
	1. Because of spiritual attraction of landscape	1.39	(0.03)
	2. To live in rural community	1.37	(0.01)
	3. To enjoy clean air	1.36	(0.03)
	4. To enjoy clean rivers & lakes	1.34	(0.02)
	5. To live in an area of diverse plants/ wildlife	1.29	(0.03)
	6. Because of mountains and mountain views	1.26	(0.04)
Volunteer time and skills	• Education		
	1. Some graduate school	5.62	(0.04)
Donate money	• Education		
	1. Bachelors	3.61	(0.04)

Table 4. *Analysis of one-way variance (ANOVA)* results comparing resident types' responses on Valley Future Key Issues
(Note: Only statistically significant results are listed here.)

VALLEY'S FUTURE KEY ISSUE	Local people	Amenity migrants	Economic migrants	Returned resident	*F* (p-value)	Post-hoc
1) Public recreation facilities, parks	2.33 (1.53)	3.51 (1.26)	3.55 (1.02)	3.70 (0.94)	<0.001	Amenity/Local Economic/Local Returned/Local
2) Fossil fuels shortage	2.16 (1.29)	3.29 (1.18)	3.38 (1.08)	2.88 (0.60)	<0.001	Amenity/Local Economic/Local
3) Public transit, e.g. a bus system	2.16 (1.33)	3.11 (1.32)	3.20 (1.39)	2.11 (0.92)	<0.001	Amenity/Local Economic/Local
4) Food security	2.68 (1.53)	3.61 (1.28)	3.53 (1.10)	3.88 (1.05)	0.04	Amenity/Local
5) Water infrastructure systems	3.27 (1.48)	4.14 (1.04)	4.26 (0.82)	4.20 (0.78)	<0.001	Amenity/Local Economic/Local Returned/Local
6) Sewer systems	3.05 (1.34)	3.87 (1.10)	3.92 (1.05)	4.10 (0.99)	0.02	Amenity/Local Economic/Local Returned/Local
7) Housing for seniors	3.05 (1.55)	3.85 (1.12)	3.90 (1.13)	3.55 (1.13)	0.04	Amenity/Local
8) Services for seniors	3.21 (1.65)	4.02 (1.17)	4.00 (1.06)	3.30 (1.49)	0.02	Amenity/Local
9) Availability of medical services	3.55 (1.63)	4.29 (1.02)	4.43 (0.80)	3.70 (1.05)	<0.001	Amenity/Local Economic/Local
10) Water quality	3.57 (1.64)	4.23 (1.10)	4.50 (0.71)	4.10 (1.28)	0.04	Economic/Local

Table 5. *Analysis of one-way variance (ANOVA)* results comparing resident types' opinions on Quality of Life Issues
(Note: Only statistically significant results are listed here.)

QUALITY OF LIFE KEY ISSUE	Local people mean	Amenity migrants mean	Economic migrants mean	Returned resident mean	F (p-value)	Post-hoc
1) Level of crime	2.75 (1.37)	3.92 (1.15)	3.91 (1.37)	3.30 (1.56)	<0.001	Amenity>Local Economic>Local
2) Shortage of water	2.57 (1.50)	4.03 (1.16)	3.90 (1.30)	3.40 (1.57)	<0.001	Amenity/Local Economic/Local
3) Can't afford to own a property	2.52 (1.57)	3.08 (1.57)	3.82 (1.60)	2.60 (1.64)	0.02	Economic/Local
4) Climate change	2.15 (1.21)	3.40 (1.26)	3.00 (1.19)	2.40 (1.42)	<0.001	Amenity/Local
5) Can't make a decent living	3.05 (1.73)	2.35 (1.57)	3.5 (1.61)	2.50 (1.58)	<0.001	Economic>Amenity
6) High cost of living	2.78 (1.35)	3.71 (1.29)	3.94 (1.25)	3.00 (1.56)	<0.001	Amenity>Local Economic>Local
7) Rate of growth: too fast	2.73 (1.44)	3.40 (1.32)	2.67 (1.49)	3.00 (1.49)	0.02	Amenity> Economic
8) Environmental degradation	2.88 (1.23)	4.04 (1.08)	4.03 (1.01)	3.50 (1.58)	<0.001	Amenity>Local Economic>Local

Appendix B

Amenity-Led Migration in the Similkameen & South Okanagan Valleys, BC, Canada

Project Phase I Technical Report: Amenity-Led Migration Survey

14 April 2008

Client: Similkameen Valley Planning Society

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1. Introduction

1.1 Amenity-Based Regional Change

Amenity migration refers to the permanent and part time movement of people, called *amenity migrants*, to places principally because of their actual or perceived higher environmental quality and cultural differentiation. Others who move to the same places primarily for economic opportunity (for a job, to start a business or other economic reason) are referred to as *economic migrants,* and the term *amenity-led migration* is used when referring to amenity migrants and economic migrants together (Moss 1994, 2006; Price *et al* 1997; Glorioso 1999). Obtaining strategic information about these resident types is the principal objective of the survey undertaken in Phase I of this project. To better understand and manage amenity-led migration and the changes it is bringing to the Similkameen and South Okanagan Valleys, it was also considered imperative to know attitudes and responses to this phenomenon of earlier inhabitants of the valleys. Therefore, this is also an objective of the survey.

Amenity-led migration, both part time and more permanent, is increasing around the world, especially today in mountain regions, where it is an equal or greater societal change agent than tourism; but one much less is known about. The change it brings is both beneficial and threatening. It appears that as the quality of our natural environment and distinctiveness of rural cultures decrease around the world, these amenities are more highly valued and sought. This process is resulting in increasing amenity migration, which is generally further degrading the ecosystems and cultures of high-amenity places. In turn, this pattern is detrimental to inhabitants of both mountains and lowlands as they share a dependence on mountains and their valleys for both utilitarian and intrinsic benefits.

What is driving amenity migration in mountainous regions? A pattern appears to have emerged of it being commonly the result of a coalescence of key motivating and facilitating factors. There are two meta-motivators of this change agent: higher societal valuing of the natural environment and differentiated culture. Nested within these are the following motivators: leisure, flight from the negative conditions of large cities, economic opportunity, learning (including spiritual and aesthetic motivation) and climate change (Moss 2006, in press). The economic motivator referred to here is secondary to a place's amenities; not the primary one that drives economic migrants. Integrated with these motivators are key factors facilitating this late-modern mobility: access-facilitating technology, discretionary wealth, land availability (or cost), discretionary time, and destination comfort amenities. Figure 1. illustrates this movement pattern, particularly for

western North America. The gradation in typeface size of factors indicates their comparative importance today; larger for greater importance. The significance of these factors has changed over time. For example, some two decades ago the general importance of discretionary time and spiritual development were seemingly greater (Moss 1994, 2006 Ch 1). Also, comparatively high land availability has been a strong facilitator of amenity seekers. However, particularly in wealthier countries, this key factor is shifting to a negative value in high amenity mountain locations as land availability decreases and its cost increases. The impacts of climate change have recently appeared as a key motivator, and one that is likely to increase in importance.

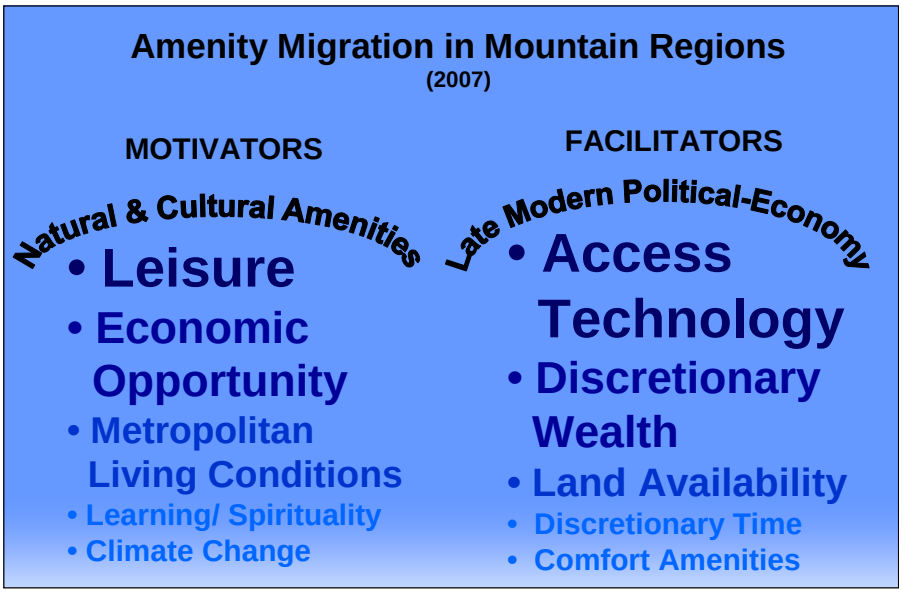

*Figure 1. Amenity migration paradigm indicating comparative significance of key motivators and facilitators in approximately 2007 (*Moss, in press).

1.2 Need For A Similkameen and South Okanagan Survey

While information about amenity-led migration's (ALM) causes and effects has generally increased over the past several years, this knowledge, especially empirical data, is still quite limited. To date the type of census and related information being collected unfortunately sheds very little light on this growing change agent. More specifically, very little information existed about ALM in the Similkameen and South Okanagan Valleys, BC prior to this project. Therefore, for formulating and implementing an effective strategy to harness the benefits and ameliorate the threats of ALM to human communities and ecologies of the two valleys, a baseline of relevant information needed to be generated through a survey. This report sets out the most relevant of the baseline information developed by a survey undertaken in 2007/2008. Considerably more information

was generated by the survey and is available for further analysis as need dictates.

2. Survey Method

2.1 Survey Description

The following abbreviations are used commonly in the report:
AM refers to amenity migration, *AMs* to amenity migrants, *EMs* to economic migrants, *LRs* to local born and/or raised residents, *RRs* to returned residents, and *OM* for other migrants. *S* is used in referring to the Similkameen Valley, *SO* to the South Okanagan Valley, and *SSO* or *study region* in referring to the two valleys together. *KIS* refers to the key informant interviews tool and *HHS* refers to the homeowners household survey tool used in this project.

Basic to the analytical method for developing base line knowledge about ALM in the SSO was a triangulation of three components: an in-depth interview of key informants, a questionnaire mailed to a random sample of households, and the undertaking of the project by consultants with expert ALM knowledge. The survey employed both quantitative and qualitative analytical techniques to take advantage of the strengths of both. Initially 15 persons knowledgeable about the socio-cultural, political-economic and biophysical condition of the valleys were selected and interviewed. All interviews were individual, typically lasted just over 1 hour each, and were guided by the same set of 50 questions. The information obtained rendered significant insight into ALM in the study region, and was also very useful in formulating a random sample questionnaire. Subsequently a 40 question sample survey was designed, tested and mailed to 2600 households in the study region: 12**%** of owner residents and 8.9% of total households. To assist in obtaining a representative sample from the 8 incorporated and unincorporated public jurisdictions in the study region, each was allocated a proportional representation of questionnaires. In addition, the survey was advertised in local newspapers and on regional radio, and several editorials were written encouraging local participation. The results of the KIS and HHS were subsequently analyzed. Appendix 1. and 2. of this report contains copies of the two survey tools used.

2.2 Survey & Report Strengths & Weaknesses

Using both qualitative (KIS) and quantitative (HHS) survey tools brought greater depth, breadth and veracity to the analysis, along with the opportunity to benefit from the strengths of two different methods. A SSO wide public concern about ALM and its effects brought a high level of cooperation in undertaking the survey. All the key informant interviewees were quite interested and focused on the task, and the sampled households returned 30.5% of the questionnaires mailed out, a high percentage for this type of survey.

The household survey may be considered to have had several weaknesses. Renters were not specifically surveyed, and some are ALM. While the First Nation communities were likely to have few amenity-led migrants their attitudes and knowledge about ALM will be significant for strategy formulation and implementation, especially given their significant land ownership in the valleys. These two shortcomings were ameliorated to some extent in the KIS. In addition, returning residents (RR) were identified as a separate cohort. However, most RRs did not consider themselves migrants to the valleys, and their ALM characteristics can be obtained from a more detailed analysis of the information collected.

While not a weakness of the survey *per se*, this report may also be considered to have some shortcomings. Two are identified and explained here. The report does not compare or relate some specific SSO findings to their larger socio-economic context. For example, it does not compare the age cohorts and housing values of respondents to those of BC or Canada more generally. Also, in some instances, additional useful and more sophisticated analyses could be expected. For example, regression analyses to determine relationships among key factors, such the affect of education, income and age on environmental attitudes and behaviour were not undertaken. These tasks were not undertaken because of a shortfall in funds due especially to the unanticipated need to expand the HHS sample from 2000 to 2600 households in order to obtain sufficient representation from more rural unincorporated jurisdictions in the study region. In addition, the cost of data tabulation was higher than estimated in the project proposal, due mainly to the processing and analysis of 792 returned surveys, compared to 600 anticipated in the project budget estimate. Nevertheless the report is a detailed, very useful baseline of knowledge, and if and where shortcomings exist for the project's Phase II, further analysis of the rich data bank collected can be undertaken.

3. Key Finding of the Survey

3.1 Migrants Socio-Economic Profiles

The following section of the report offers baseline information in profile format, focusing on the socio-economic characteristics of SSO amenity migrants (AMs) and economic migrants (EMs). To give further depth to these profiles, and especially for comparison, information is included about local born & raised residents (LRs) and returning residents (RRs), and where significant for the above aim, the mainly default category of other migrants (OMs). In addition, salient similarities and differences between the two valleys are identified.

3.1.1. Residence Type

Of the total households surveyed in the study region, 82.3% stated they were owner occupied residents, and 16.1% were 2nd homeowner resident type. It should be further noted that one-third of the 2nd homeowners indicated an intention to become full time residents in the future.

While there was little difference between the two valleys for primary residence percentages, 2nd homes in S was 25.3 % of the total, and in SO 11.9%. Further, within S, 2nd homeowners in the more rural unincorporated areas numbered 45.1% in the Upper S and 12.1% in the Lower S. In comparison, in the more rural area of SO the number was 4.7%.

When asked if they were an amenity migrant, economic migrant, local resident, or returned resident, 57.3% of the respondents identified themselves as AMs, 17.7% as EMs, 11.4% as LRs and 8.3% as RRs. Among the AMs, 20.8% identified themselves as 2nd homeowners. A comparison of the two valleys from this data source indicates a higher percentage of AMs in S than SO (63.6% and 54.6% respectively). EMs were a slightly higher percentage in SO than in S (18.4% and 16%).

The KIS gave a profile for these characteristics that corresponded closely, although the key informants generally underestimated the percentage of AMs in S; approximately 38% estimated in the KIS compared to 64% self-identified in the HHS. The total and two valley relative numbers of AMs and EMs do not appear exceptional compared to other western North American high amenity places. The percentage of 2nd homeowners is similar, except for Upper S, which approaches percentages in mountain resort towns.

3.1.2. Amenity and Economic Migrants Mobility

3.1.2.1. Origin of Amenity Migrants

Canada was the origin of 94% of the amenity migrants in the two valleys, followed by 2.7% from the USA and then 1.7% from Germany. 70.7% of all AMs, originated from BC and 16.2% from Alberta, followed by 5.7% from Ontario, 3.6% from Saskatchewan and 3.6% from Manitoba. The BC Lower Mainland accounted for some 49% of all AMs, and the Vancouver metropolitan area 31%. Comparing cities, Vancouver accounted for 14.1%, followed by Calgary at 6% and Edmonton 4.6%. The total percentage for AMs originating from metropolitan areas was about 48.7%. This suggests that about half of the study region's AMs come from smaller towns and rural areas. However, when we take into account the mobility propensity data below (3.1.2.4), this number needs to be factored down due to serial amenity migration.

Comparing the S and SO areas, proximity of origin is pronounced for the AMs in both; those from BC account for 85.7% of total AMs in S and 63.5% in SO, while those from Alberta account for 21.3% of total in SO and 5.6% in S.

The KIS and HHS findings reinforce one another on this origin characteristic. Also, the more general research on ALM suggests a typical pattern exists, The 49% of all AMs originating from metropolitan areas seems lower than anticipated from a comparison with the AM literature. However, there does not appear to be empirical data for comparison.

3.1.2.2. Origin of Economic Migrants

Canada with 95.5% dominates the origin of EMs, followed far below by Germany and India each with 1.5% of total EMs. Also, 61.4% of all EMs originated in BC, followed by 15% from Alberta, then 6.3% from both Ontario and Saskatchewan, and 1.6% from Quebec. BC Lower Mainland accounted for some 28.6% of the EMs and the Vancouver metropolitan area for 21.8%. Vancouver accounted for 16.8% of the total, followed in descending percentages by Calgary with 4.2%, Edmonton and Regina both with 3.4%, Victoria with 2.5%, Ottawa with 1.7% and Toronto w/ 0.8%. Metropolitan areas accounted for a total of 40.3%.

Parallel to the AM pattern reported above, but less pronounced, BC is responsible for 75.8% of all EMS in S and 56.4% in SO, and Alberta is the origin of 18.1% of this migration type in SO and 6.1% from BC. Those originating from Ontario and Saskatchewan are 6% in both valleys, and those from Quebec 3% in S and 1.1% in SO. A number of KIS interviewees overestimated the source of Quebec for economic migrants, as the HHS identified 2 EMs from this province. The typically high presence of seasonal labourers from Quebec for fruit harvesting may have cause this impression.

The high percentage of ALMs originating in BC and Alberta, along with about half coming from non-metropolitan areas suggests a positive factor in later strategic considerations of cultural difference and similarity among study area residents.

3.1.2.3. Chronology of Migration: Amenity Migrants & Economic Migrants

Table 1 based on HHS findings, shows the number of AMs who moved to SSO by 5-year time period from 1950 to 2007. The greatest number of AMs migrated in 2001-2004 at 25.4%, followed by 1995-2000 at 13.9%, then 1990-1994 and 2005-2007 with equal percentages of 13.7%. From 1950 to 1989, less than 10% moved to SSO in each 5-year period. For the total period of 1950 to 2007, SO attracted more AMs than S; as much as 72.2% in 1980-1984 and as little as 40% in 1955-1959, averaging 50.4% each 5-year period.

Comparing the two valleys, although most amenity migrants in S (30.1%) and SO (23.2%) arrived in 2001-2004, AMs arrived in SO in significant numbers (more than 10%) in the 5 previous years (1990-1994 at 15.5%) than in S (1995-2000 at 16.3%). This corresponds with the KIS estimate for the beginning of AM in SSO. While the majority of KIS agree that AM in S started sometime in 2000, due principally to the dramatic increase in real estate prices in Vancouver metropolitan area, the KIS estimate for SO was varied. One key informant said it began in the late 1960s, another in the 70s with an increase in people retiring and looking for warmer climate, and another interviewee said in the late 1980s, principally with Alberta's snowbirds and new money, then in the 1990s and early 2000s. This corresponds highly with the spikes of AMs in SO. From 1965 to 1969 AMs grew by 400% from the previous 5-year period; the 2nd spike was in 1970-1974 where AMs grew by 200%; the 3rd in 1985-1989 with an increase of 44.4%, 4th in 1990-1994 with an increase of 61.5% and the last dramatic increase of AMs in SO was in 2001-2004 with an increase of 80.0%. Therefore, the SO pattern appears different from that of S. However, if we base our analysis on what drives AM more generally (see Figure 1), then we may assume that AM in SO began in the third spike, 1985 to 1989.

Table 1. Chronology & Magnitudes of Amenity Migration to SSO

Year AMs Migrated to SSO	Similkameen Valley (S)		South Okanagan Valley (SO)		Similkameen & South Okanagan Valleys (SSO)		SO's Lead Over S in No. of AMs
	Freq	%	Freq	%	Freq	%	%
1950 - 1954	1	0.8	1	0.4	2	0.5	0.0
1955 - 1959	3	2.4	5	1.8	8	2.0	40.0
1960 - 1964	1	0.8	2	0.7	3	0.8	50.0
1965 - 1969	4	3.3	8	2.9	12	3.0	50.0
1970 - 1974	7	5.7	16	5.9	23	5.8	56.2
1975 - 1979	7	5.7	18	6.6	25	6.3	61.1
1980 - 1984	5	4.1	18	6.6	23	5.8	72.2
1985 - 1989	9	7.3	26	9.5	35	8.8	65.4
1990 - 1994	12	9.7	42	15.5	54	13.7	71.4
1995 - 2000	20	16.3	35	12.9	55	13.9	42.9
2001 - 2004	37	30.1	63	23.2	100	25.4	41.3
2005 - 2007	17	13.9	37	13.6	54	13.7	54.01
TOTAL	123		271		394		

Based on the HHS, Table 2. shows the number of EMs who moved to SSO from 1950 to 2007 in 5 year intervals. From 1950 to 1974, SSO attracted 21.7% of its EMs, averaging a 4.3% increase per 5-year period. Then, from 1975 to 1994, an additional 54.8% of its total EMs moved in, averaging 13.7% per 5-year period; an increase of 9.4% per period. But from 1995 to 2007, it increased only an average of 7.8%, an average decrease of 5.9% per 5 years from the previous time period.

Comparing the two valleys, about one-third of all EMs in SSO lived in SO from 1950-2007, averaging 65.4% more EMs than in S in each 5-year period. The only time SO's lead was below 50% (a 20% lead) was in 2001-2004, with 4 EMs migrating in S compared to 5 EMs in SO. Also in this period, EMs in S increased 100% from the previous period of 1995-2000, while EMs in SO had decreased by 37.5% from 1995-2000 to 2001-2004. However, S was not able to sustain the pattern as EMs decreased again by 50% in the following period while SO's EMs increased by 37.5%, regaining their loss from the previous time period. But caution should be used, as there were only 3 years in the last period of comparison (2005 to 2007).

Although there were many more EMs attracted to live in SO, S started to attract significant numbers of EMs (more than 10% of its total number) 5 years earlier (1975-1979 with 12.5% EMs) than SO (1980-1984 with 18.5% of its EMs). The highest percentage of EMs in S was in 1990-1994 at 15.6%, while in SO it was in 1980-1984 at 18.5%. However, EMs in this period may not be the result of amenity-led migration since AM, as suggested in Table 1 has occurred much later in S and about 5 years later in SO. A more refined statistical analysis should be made in Phase II to further determine this significant relationship.

Table 2. Chronology & Magnitudes of Economic Migration to SSO

Year EMs Migrated in SSO	Similkameen Valley (S)		South Okanagan Valley (SO)		Similkameen & South Okanagan Valleys (SSO)		SO's Lead Over S in No. of EMs
	Freq	%	Freq	%	Freq	%	%
1950 – 1954	0	0.00	1	1.1	1	0.8	100.0
1955 – 1959	1	3.1	4	4.3	5	4.0	75.0
1960 – 1964	1	3.1	4	4.3	5	4.0	75.0
1965 – 1969	2	6.2	4	4.3	6	4.8	50.0
1970 – 1974	3	9.4	7	7.6	10	8.1	57.1
1975 – 1979	4	12.5	9	9.8	13	10.5	55.6
1980 – 1984	4	12.5	17	18.5	21	16.9	76.5
1985 – 1989	4	12.5	14	15.2	18	14.5	71.4
1990 – 1994	5	15.6	11	12.0	16	12.9	54.5

Year EMs Migrated in SSO	Similkameen Valley (S)		South Okanagan Valley (SO)		Similkameen & South Okanagan Valleys (SSO)		SO's Lead Over S in No. of EMs
	Freq	%	Freq	%	Freq	%	%
1995 – 2000	2	6.2	8	8.7	10	8.1	75.0
2001 – 2004	4	12.5	5	5.4	9	7.2	20.0
2005 – 2007	2	6.2	8	8.7	10	8.1	75.0
TOTAL	32		92		124		

3.1.2.4. Mobility Propensity of Study Region Residents

29.6% of the AMs in the study area stated that they had amenity-migrated to another destination previously, and 5.7% of AMs residing in the study region said they were considering moving to another high amenity place. In addition, of all other HHS respondents in SSO, 11.4% stated they are considering becoming amenity migrants elsewhere.

3.1.3 Age, Gender and Household Type

Information on age, gender and household type obtained for the SSO from the KIS corresponds highly with the HHS findings reported below. Both reflect the more general information about these AM characteristics, especially for western Canada and USA mountain regions.

3.1.3.1 Age & Gender of Respondents

The youngest age cohort of 18-34 yrs made up only 8% of the responding households. Within this AMs accounted for 0.7%, EMs 2.2%, RRs 32% and LRs 4.5%. In the 34-64 yrs cohort AMs were about 10% less than other resident types and, while in the 65-74 cohort they were about 8% more. Comparing the two valleys by these resident types showed close similarity between AMs and EMs, but with S having more than double the percentage of LR 18-34 year olds than SO (14.3% compared to 6.15%). This pattern corresponds with KIS findings for the study region, and also with related general AM information.

Approximately half the respondents to the HHS were male and half female, with more males in S than SO (58% to 47%).

3.1.3.2 Household Type

Only 13.8% of all respondent's households had or expected to have children. For AMs the percentage was 9.7%, while EM households were very similar to LR; 22.2% and 21.4% respectively. The household retirement data strongly reflects this picture, with 55.2 % of the AM type being retired, and another 18.7% semi-retired; together 73.9% of all AM households. Also, EM and LR households were 29.3% and 29.8% retired, and 47.8% and 43.6% respectively when aggregating retired and semi-retired. The KIS information corresponds well.

Comparing the two valleys indicates that S had about the same retired as SO, but over half the semi-retired (12.9% compared to 21.5%), about the same percentage of retired EMs, but less than half the semi-retired EMs (8.3% compared to 18%), and overt half the retired LRs (15% to 34.4%). However, S has about double the retired LRs of SO (20% compared to 10.9%).

3.1.4 Education

The AMs generally had a little higher achievement level of formal education than both total households and LRs in SSO. Within this general picture, the difference is most pronounced for graduate studies level, with attainments of 8.3% for AMs and 3.2% for both all SSO households and LRs. For undergraduate degrees the comparison is 13.1%, 13.2% and 8.7% respectively, and for high school graduation the comparison is 27.9%, 25.2% and 16.1% respectively. For those respondents having some high school education the percentages are respectively 11.7%, 12.4% and 9.7%.

Notably the EM resident type had the highest percentages for both categories of university education (10.5% graduate studies; 15.3% undergraduate degree) compared to AMs, LRs and total SSO households. It should also be noted that the RRs type also ranked higher than AMs, LRs and total households for bachelors degrees at 14.5%.

A comparison of the two valleys indicates a few key differences. High school graduated EMs in S was approximately double that in SO (25% and 12.6% respectively). LRs in S with some high school education were 26.3% in S and 18% in SO, a pattern that reverses for high school graduation with 36% for LRs in SO and 21 % in S. While university education was similar at the bachelor level for the two valleys, for post graduate studies SO had 13.7% compared to 2.8% in S. Comparing higher education of local resident respondents, 13.1% of SO and 0% of S respectively had bachelors degrees or some graduate studies.

Referring to the general AM information available, SSO AMs appear to have less educational attainment compared to LRs than would be anticipated. This may reflect a generally higher education attainment (urban/rural) in western Canada, and/or on the other hand high percentage of non-metropolitan originating AMs.

3.1.5 Employment & Income

3.1.5.1 Employment

Looking again first at amenity-led migrants in the whole study region, 56.9% of AMs were *retired* and 10.4% *semi-retired*, while 30.8% were *employed* (18.7% *employed* and 12% *self-employed* aggregated). Of the EMs 31.8% were *retired* and 6.7% *semi-retired*, while 60% were *employed* (36.3% *employed* and 23.7 % *self-employed*). For comparison 29.1% of LRs were *retired* and 0 *semi-retired*, with 61.6% *employed* (36% *employed* and 25.6% *self-employed*). A significant percentage of AMs were economically active, the *employed* or *semi-retired* 67.3% of the total, especially given the commonly held impression in the study region that most AM were retired from economic activity.

More detailed analysis of the *other* (especially *employed* and *semi-employed*) and the *under-employed* categories should be undertaken in Phase II.

Comparing S and SO there appears to be little general difference across resident types regarding employment. However, more detailed analysis indicates that *employed* LRs were a significantly larger percentage in S than SO (71.4% and 58.5% respectively). In addition, there are some significant differences in the *self-employed*; for EMs in S 30.6%, and in SO 21.2%. Similarly for RRs in S it was 30% and in 13.7% in SO.

3.1.5.2 Income

The annual household income data obtained from the HHS is problematic. Only 46.8% of the respondents indicated their income, and for AMs and EMs in particular the percentages were lower; 23.6% and 35% respectively. Nevertheless, here are income highlights for those who did give their incomes. In the below $25,000 annual household income bracket were 3.8% of AMs, 2.4% of EMs and 4.6% LRs. In the next highest income bracket of $25,000 – $99,000 were 17.6% of AMs, 22.4% of EMs and 19.3% of LRs. In the $100,000 – $500,000 bracket were 8.8% of AMs, 8.1% of EM and 9.15% of LRs.

In another section of the HHS questionnaire 59.3% of the SSO AMs stated they came to the study region expecting to be *living on pensions, capital and investments*. In the KIS interviewees advised that this wealth was being substantially augmented in both valleys by equity that AMs in particular brought with them from the sale of their previous place of residence, especially where housing prices were substantially higher than in the SSO, such as Vancouver, Calgary and Edmonton.

Comparing S and SO with this limited data suggests in general there was not an appreciable difference in income between S and SO. However, it does indicate

that in the $25,000 – $99,000 income bracket for EMs there were 28% in S and 18.3% in SO. For the same resident type in the $100,000 – $500,000 income bracket there was 2.9% in S and 13.4% in SO. Similarly for this income bracket of LRs there was 5.6% in S and 12.7%on SO. The KIS information conforms to this picture, and it also indicates that AMs in SO and S had similar incomes, but that there are a larger number of wealthy AMs in SO. This is also reflected in a KIS general opinion that discretionary wealth plays a greater role as a motivator for AMs to SO than S. Further, that AMs in Upper S generally have greater discretionary wealth and income than those residing in Lower S.

3.1.5.3 Business Activity

The respondents' business activity gives further insight into SSO employment and income. The percentage of the total respondents to have started a business in the study region was 25.2%. By resident type 46.9% of EMs started a business, 42.5% of LRs, 22% of RRs and 16.5% of AMs. The survey respondents invested a total of $201.5 million and created 963.5 jobs. Notably, of this amount the AM group were responsible for $167.7 million.

The percentage of respondents responsible for starting businesses was about the same in S and SO; 23.5% and 25.9% respectively. The number of businesses started by them in S was 23 and in SO 80, and investment in these businesses in S was $165.3 million, and in S0 $36.2 million. The number of jobs they created was 174.5 in S and 789 in SO.

The economic impact of both AMs and EMs on the study region has been significant, both in direct investment and job creation and also in the wealth migrants have access to for local spending. The latter is partially reflected in property purchase, construction, improvement and value increase in the housing and land use characteristics outlined next (Section 1.3.6).

3.1.6. Housing and Land Use Characteristics

3.1.6.1. Residence and Property Type

70.1% of the HHS survey respondents indicated they owned and resided in single detached houses. Considerably fewer owned: mobile homes (10.1%), condominiums (8.9%), townhouses (4.3%), apartments (1.2%), with *other* accounting for 5.3%. Those who purchased a vacant lot and built their residence on it numbered 23.7% while 16.7% purchased a property with a home on it and replaced it with a new one. AMs were about as likely as other resident types to purchase and build a new house (15% and 17% respectively). For both valleys 95.3% of the respondents stated they had not subdivided their property nor had an intention to do so.

73.9% of the respondents had property of 1 ac or less, 18% 1.1 to 10 ac and 8.4% more than 10 ac. And 76.9% of AMs, 67.2% of EMs, 72.9% of RRs and 73.2% of LRs had property 1 ac or less. The average land size for residential property of less than 10 ac was 1.1 ac, and the number of respondents residing on more than 10 ac was 56. More AMs lived on 1/2 acre or less than any other resident type, and appear under represented in all larger property size classifications.

Comparing the two valleys found several notable differences. The percentage of single detached homes was 74.5% in S and 68.3% in SO, and mobile homes were 13.9% and 8.6% respectively. Townhouses accounted for 2.3% in S and 5.1% in SO, and condominiums 0 in S and 12.6% in SO. The below 10 ac average lot size was 1.2 ac for S and 1.0 ac for SO, while the number of respondents residing on more than 10 ac of property was 23 in S and 33 in SO. In the S 54% of AMs' property was 0.5 ac or less, while in the SO the percentage was 71.2%. For LRs this compares in the S with 47.6% and 60.9% in the SO.

The pattern of the above residential characteristics conforms highly with that described in the KIS.

3.1.6.2. Residential Property Value

Of the total respondents in the study area 59.9% (excluding extreme data) answered the question asking them the cost of their real property, including improvements made. The mean cost was $224,000, and the median cost was $200,000. 53.9% (excluding extreme data) also estimated the present value of their property and the mean was $468,000, and median was $400,000. These amounts indicate SSO mean and median increases of $244,000 and $200,000 respectively. These appreciations do not take into account the number of years property has been owned. AMs' house values appeared average, while RRs had the most houses valued over $500,000.

In comparing the two valleys, both the mean and median for cost and estimated present value were lower in S than in SO. See Tables 3 and 4. Further analysis of property value data disaggregated into the 5 resident types awaits additional project funding.

Housing information from the KIS coincides well with the above HHS finding. Also, the increase in real property values indicated in the survey results fits the general characteristic for high amenity places. The difference between the two valleys likely reflects to a considerable extent the more developed stage of amenity migration and the greater urbanization of SO compared to S. Compared to the limited figures available for other western North American high amenity

inland valleys the increase in monetary value indicated for SSO, and especially S, are not exceptional.

Table 3. Cost of SSO Respondents Real Property (Including Improvements)

Property cost	Similkameen Valley	South Okanagan Valley	Total (Both Valleys)
Total $ (excluding extreme data)	17,157,000	66,882,000	84,040,000
Number of responses (excluding extreme data))	104	270	374
Mean $	165,000	248,000	224,000
Median $	145,000	200,000	200,000
Min. $ price	4,000	8,000	4,000
Max. $ price	1,000,000	985,000	1,000,000
Extreme data excluded	$200, $240, $200,000,000	$150,000,000	$200, $240, $150,000,000, $200,000,000

Table 4. Estimates Selling Price of SSO Respondents Real Property

Property anticipated selling price	Similkameen Valley	South Okanagan Valley	Total (Both Valleys)
Total $ (excluding extreme data)	42,900,000	154,754,000	197,654,000
Number of responses (excluding extreme data))	111	311	422
Mean $	386,000	498,000	468,000
Median $	290,000	400,000	400,000
Min. $ price	37,000	20,000	20,000
Max. $ price	2,500,000	2,000,000	2,500,00
Extreme data excluded	$270, $400 & $390,000,000	$350, $600, $2500 & $345,000,000	$270, $350, $400, $600, $2500, $345,000,000, & $390,000,000

3.2 Key Motivating & Facilitating Factors

The motivating and facilitating factors identified in the KIS for amenity migration fit the more global pattern outlined above in Section 1.1. These interviews also indicate that while varying in degree, the same key factors motivated and facilitated the migration and residency of EMs (economic migrants), RRs (returned residents) and LRs (local born & raised) in both valleys. Although the key informants stated a difficulty in ranking key motivating factors because they are systemically inter-related, they ranked as 1st *superior natural environment*, 2nd *cultural differentiation*, 3rd *flight from large cities*, and 4th *leisure*. *Learning*, which includes spirituality, and *economic gain* were also ranked important, but 5th and 6th respectively. A number of key informants stated that *economic gain* will likely become more important in the future, along with *flight from large cities*. More specifically, *climate, clean environment, rural lifestyle, quietude and outdoor recreational opportunities* were the main natural and cultural attractions for both moving to and remaining in the study region.

Among the key factors that facilitated amenity migration to the SSO identified in the KIS, *discretionary wealth* ranked 1st, *comfort amenities* 2nd, *discretionary time* 3rd and 4th *access technologies* (IC&T). A number of interviewees stressed that while *discretionary wealth* is the most important facilitator, many amenity migrants came with equity they obtained from selling properties they previously owned elsewhere in high value housing markets, and so have more than enough to purchase land in SSO, where it remains comparatively cheap. This was stated as pertaining more so in S than SO and other well-known high amenity locations in Canada, such as Canmore, Whistler, the Kootenay area (and also Vancouver), where many SSO amenity migrants were said to come from (see Section 3.1.2 above). Further, although access technologies have greatly improved in SSO in recent years, the electronic communications component is not widespread, with many rural areas not having internet and cell phone access. Consequently, amenity migrants, while having excellent highways and roads, and good airports, have to date not depended very much on this aspect of the technological facilitating factor. However, a common interviewee opinion was that it will become more significant in the future.

To obtain more detailed and quantitative information about motivators and facilitators, and test veracity of the survey tools, HHS Question 4. was asked: *If you came to the Valley as an adult (migrant or returned resident), what were your reasons for coming and how important were those reasons to you at the time? OR if you are a local person what are your reasons for remaining in the Valley?* A list of 29 choices were given, including one *Other*. The resulting ranked motivators and facilitators can be found in Table 5; the former in blue and the latter in yellow. It should be emphasized that in the KIS 6 motivators and 6 facilitators were actually ranked in importance (1 through 6) by interviewees, while in the HHS ranking is based on the total number of times each motivator and facilitator was identified by the respondents. Also, only *Very Important*

Reasons in the HHS have been ranked, which is sufficient for Phase I purposes. A more detailed ranking analysis will be undertaken in Phase II.

HHS results show that superior natural environment type reasons ranked 1st. This was not only among AMs, but also across all resident types, including EMs. Economic migrants in S chose *To enjoy clean rivers and lakes* most often, although its lead was only 5.5% over *For a job,* which came 2nd (54.1% to 48.6%). In SO EMs ranked *For a job* 1st, then 2nd, *Because of the climate*, with the first ranked 7.9% above (62.4% to 54.5%).

As indicated by the KIS also, facilitating factors for moving to or remaining in SSO were more important than motivators for EMs, LRs and RRs when compared to AMs, especially *For a job* and *Lower cost of living*. It should also be noted that the ranking of OMs on this specific topic is very similar to that of AMs, which suggests many may also be AMs. The main difference between these two groups is the AMs' most important facilitating factor was *Cheaper property*, compared to *Lower cost of living* and *Good facilities for seniors* for OMs. In Phase II those migrants that classified themselves as *Other* need to be further studied, as it appears most will actually be better classified as AMs or EMs based on their stated reasons for moving to SSO.

The HHS also reveals that except for RRs residing in S, migrants as well as residents in S chose either *Clean air* or *Clean rivers and lakes* as the premier motivating factor, while the SO respondents chose *Climate* most frequently.

One difference in motivators identified in the KIS compared with HHS results is the clear identification and higher ranking of cultural differentiation or distinctiveness in the former. A likely reason is that the KIS format of in-depth personal interviewing allowed cultural amenities to be discussed and further explained if wished by the interviewee. This is a comparative strength of the KIS interview method, as the HHS type does not allowing discussion of things recipients may find difficult to understand. However, from experience with previous amenity migration surveys, the following reasons were included in the list in reference to cultural amenities: *Because it is culturally distinct*, *To live in a rural community*, *To be in a safer place* and then *For peace and quiet*. When aggregating the choice of these reasons KIS results correspond with that of both migrants and other residents in S, but not in SO. In SO, leisure comes 2nd as a motivator, and cultural distinctiveness comes 3rd.

Table 5: *Very Important* Reasons for Migrating to or Remaining in Similkameen and South Okanagan Valleys, BC, Canada

VERY IMPORTANT REASON	RANK BASED ON NUMBER OF TIMES MENTIONED										
	Amenity Migrant		Economic Migrant		Local Born or Raised		Returned Resident		Other Migrant		Over-all Rank
	S	SO	S	SO	S	SO	S	SO	S	SO	SSO
1) For a job	17	14	**2**	**1**	**4**	**6**	**5**	**7**	7	7	14
2) To pursue a business opportunity	18	19	4	6	**4**	12	6	11	8	9	22
3) For peace and quiet	2	4	5	6	3	5	2	5	2	2	4
4) To live in an area of diverse plants/wildlife	5	7	12	7	4	8	5	8	2	5	10
5) To be near parks	12	8	12	8	6	10	5	9	5	5	13
6) To enjoy clean air	**1**	2	3	3	**1**	2	3	3	**1**	2	2
7) To enjoy clean rivers and lakes	2	3	**1**	4	2	3	2	2	**1**	3	3
8) Because of the climate	2	**1**	**3**	**2**	3	**1**	**1**	**1**	4	**1**	**1**
9) Because of mountains and mountain views	3	5	8	6	2	4	3	4	4	4	5
10) To be near abundant outdoor recreational opportunities (egs. golf, fishing, skiing)	7	6	NA	5	4	7	6	6	5	5	9
11) To be near Crown land for motorized recreation (trail bikes, ATVs)	14	23	16	15	6	12	5	10	9	NA	25

VERY IMPORTANT REASON	RANK BASED ON NUMBER OF TIMES MENTIONED										
	Amenity Migrant		Economic Migrant		Local Born or Raised		Returned Resident		Other Migrant		Over-all Rank
	S	SO	S	SO	S	SO	S	SO	S	SO	SSO
12) To be near Crown land for hunting/fishing	13	18	14	11	6	11	6	12	NA	NA	24
13) Because of diverse outdoor recreational opportunities (eg. golf, swimming, skiing)	10	9	13	5	7	9	7	13	8	7	12
14) Because of the wineries	21	21	15	12	9	19	NA	16	NA	9	27
15) To be in farm or ranch country	NA	16	11	12	4	9	6	14	8	7	23
16) To live in a rural community	8	12	7	10	5	13	**1**	12	3	2	8
17) To be close to family or partner	NA	20	10	14	5	13	4	14	NA	4	16
18) To have a lower cost of living	9	14	7	10	6	14	**5**	15	**5**	**5**	18
19) Because of cheaper property	**8**	**13**	6	9	8	16	**5**	15	7	7	19
20) To retire	4	10	9	13	8	16	7	NA	6	6	6
21) To prepare for retirement	11	14	14	17	7	15	4	14	8	8	15
22) Good facilities for seniors	12	15	10	14	8	17	NA	NA	**5**	**5**	17
23) To be in a safer place	6	11	6	9	5	13	3	13	2	2	7
24) Because of its comfort amenities (restaurants, shops,	16	22	15	17	9	18	7	17	6	6	20

VERY IMPORTANT REASON	RANK BASED ON NUMBER OF TIMES MENTIONED										
	Amenity Migrant		Economic Migrant		Local Born or Raised		Returned Resident		Other Migrant		Over-all Rank
	S	SO	S	SO	S	SO	S	SO	S	SO	SSO
entertainment, walk to most services)											
25) Access to health care	12	15	9	13	6	14	6	16	6	6	**11**
26) To enjoy the music or cultural scene	19	24	NA	NA	9	18	NA	NA	7	7	26
27) Because it is culturally distinct	22	26	NA	NA	10	19	NA	NA	8	8	28
28) Because of spiritual attraction of landscape	15	17	13	16	8	17	6	16	7	7	21

Note: Blue indicates motivating reasons (motivators) and yellow facilitating reasons (facilitators). For each resident type (AMs, EMs, etc.) all reasons have been ranked by the number of times it was chosen as Very important, with 1 being chosen most and 28 the least. NA means no respondent thought this reason was very important.

3.3 Attitudes and Behaviour

3.3.1 Amenity Migration As Opportunity & Threat

While the majority of KIS interviewees thought AM is definitely an opportunity, especially in S, a number of them considered it a threat, especially for SO, where it was associated with uncontrolled population growth. Those who thought it is an opportunity however, stated this only if AM is appropriately planned and managed. Otherwise, they stated that cost of living increases while incomes remain low or fixed, and uncontrolled population growth results in negative environmental and socio-economic issues, such as unaffordable land and housing and a general decrease in the *quality of life* (QL) (see Appendix 3 for KIS interpretations of the meaning of QL).

According to almost all KIS interviewees, QL in S is either improving or holding steady, while half stated that it is declining in SO; due to uncontrolled and rapid population growth coupled with infrastructure and services unable to keep pace with growth. Although the quality of life in SO was considered to have decreased, almost all KIS were in agreement that AMs are staying; not moving on. This is confirmed by response to a question in the HHS (see Section 3.1.2.3 above).

Findings from the HHS on whether AM is an opportunity or a threat for the study region reveals a more cautious or perhaps a more uninformed or less informed condition among the sample respondents. For the entire SSO 39.1% stated that AM was an opportunity, 14.6% a threat, but 41% had no opinion, while 5.1% considered it both. Comparing S and SO, 46% of the former and 39% of the latter had no opinion. Also in S 90% of RRs and 66.7% of OMs stated they have no opinion on this topic, while AMs, LRs, and EMs were about equal for it being an opportunity and having no opinion. However, SO reflects a more varied opinion than in S with 15.7% of respondents considering it a threat and 6.2% both an opportunity and threat. An important observation here is that 39% of respondents had no opinion in a place where AM has been for at least two decades ago, along with about one third of the KIS interviewees, although it was stated as negatively impacting residents' quality of life.

20.2% who answered AM was an opportunity wrote reasons which can be summarized as follows: 1) will foster planned and managed growth and development; 2) will protect the natural and cultural amenities that attracted AMs to the valley because of their new ideas and participation in community decision-making; 3) will bring economic development through the new businesses and capital they bring; and 4) will improve the level of public services in the area. On the other hand, the answers of the 28.4% who thought AM was a threat can be grouped into six key reasons: 1) lack of SSO skills to appropriately plan and manage growth and development; 2) limited resources for too many people (especially elderly) to share; 3) AMs' values and behaviours in conflict with LRs; 4) environmental degradation due to AMs' resource-consuming behaviours; 5) considerable socio-economic issues, particularly lack of affordable housing and increase in cost of living; and 6) economic stagnation.

For the total study region, when asked about their *quality of life* 18.4% said it was *improving,* 42% *holding steady,* 28.3% *declining,* and 11.3% had *no opinion.* Comparing the two valleys, 16.44% in S and 19.22% in SO said it is was *improving*; 50.66% in S and 38.43% in SO stated it was *holding steady*, 21.46% in S and 31.16% in SO said it was *declining*, while 11.42% in S and 11.19% in SO had *no opinion*. Based on these finding there were more respondents in SO who think their QL is declining, which corresponds to the general response from the KIS.

HHS respondents were also asked what issues from a list would probably decrease their QL, how major or minor the issues were, and what would cause

them to leave their valley. A score of "5" indicates the most major issue, "1" the most minor, with responses ranked by means. For the study region no issues of major importance were stated (those having as mean of 4 to 5). Nine out of 12 issues were perceived as of moderate importance (3 to 3.99) and included: *Lack of health care facilities* (3.98), *Shortage of water* (3.91), *Environmental degradation* (3.88), *Level of crime* (3.75), *High cost of living* (3.69) *Loss of wildlife* (3.61), *too fast rate of growth* (3.43), *Climate change* (3.26) and *Can't afford to own property* (3.14). The remainder of the issues were rated of minor importance (mean of 1 to 2.99), and included*: Limited access to recreational facilities (2.87), Can't make a decent living* (2.73), and *Slow rate of growth* (2.26). Except for the *Lack of health care facilities*, for which 43.5% stated they would leave and 48% would stay, no other issue came close to being a cause for more than 40% to leave.

When comparing the two valleys the following was found. In S, there were no issues perceived as major, while in SO respondents stated major issues of *Shortage of water* (4.02) and *Lack of health care facilities* (4.01). However, the majority would stay although these issues decrease their quality of life (57.1% for *shortage for water* and 49.8% for *Lack of health care facilities*).

For moderate QL issues in S they included: *Lack of health care facilities* (3.95); *Environmental degradation* (3.89); *Shortage of water* (3.80); *Level of crime* (3.71); *Loss of wildlife habitat* (3.68); *High cost of living* (3.61); *Too fast rate of growth* (3.21); *Climate change* (3.19); and *Unable to afford to own a property* (3.13). In SO, *Environmental degradation* (3.87); *Level of crime* (3.79); *High cost of living* (3.76); *Too fast rate of growth* (3.64); *Loss of wildlife habitat* (3.54); *Climate change* (3.33); *Can't afford to own a property* (3.14) and *Limited access to recreational facilities* (3.0). In both S and SO, the majority would not leave, except for the *Lack of health care facilities* among S respondents, at 47.8%. Furthermore, issue-to-issue, higher percentage of SO respondents would stay compared to S, which suggests a higher level of tolerance in SO to negative impacts of AM.

Later the results of this analysis can be strengthened by separating the responses by migrant/ resident type and by using a t-test to ascertain the differences in the mean assessments between S and SO respondents and among migrant/ resident type. This will show a true divergence of opinion and not just variation inherent to the samples drawn from the present analysis.

3.3.2 Natural Environment & Energy

3.3.2.1 Conservers and Consumers

Research about amenity-led migration indicates that amenity migrants generally tend toward two types: amenity conservers and amenity consumers (Moss 1994, 2006; Price *et al* 1997, Glorioso 1999, 2006). The data in Table 6 indicate, in rank order from most to least participation, how HHS respondents personally

behave to sustain their environment by their participation in 14 conservation activities. It also indicates the comparative level of participation by SSO resident type. AMs were more likely to recycle garbage, conserve energy use, avoid use of pesticides, use low-volume toilets, use solar power and use gray water for watering. LRs were the least likely to follow these practices. LRs were indicated as most likely to bicycle to work, share rides, own hybrid cars and use public transit. RRS were most likely to use native plants and practice xeriscaping. The EMs were close to the average in all conservation behaviour categories.

Caution must be used with these percentages, as the total number for each resident type differs. For example, 84 LRs responded compared to 432 AMs. However, the data indicates that AMs are generally resource-conservers, and more resource conserving than LRs, contrary to some KIS and HHS respondents' opinion that AMs are characteristically resource consumers. Further, because of the comparatively high percentage of AMs in the study region their impacts may be greater than other resident types in either valleys. The top 3 environmental conservation actions in SSO Valleys were: 1) *Separate recyclable garbage* (92.25%); 2) *Conserve household energy use* (88.3%); and 3) *Avoid use of pesticides and chemical fertilizers* (62.8%).

Table 6 also indicates people living in SO are more resource conserving than those in S. The extent respondents' level of education, income, age and motivation type affects respondents' environmental attitude and behaviour can be indicated by a more sophisticated statistical analysis when more funding is available.

Table 6. Environmental Conservation Behaviour of SSO Residents

ENVIRONMENTAL CONSERVATION BEHAVIOUR	RESPONDENTS' LEVEL OF PARTICIPATION			
	S		SO	
Separate recyclable garbage	EM	97.3%	OM	96.0%
	AM	92.8%	AM	95.2%
	RR	90.0%	RR	94.3%
	OM	86.7%	EM	91.9%
	LR	66.7%	LR	90.5%
	Total	90.5%	Total	94.0%
Conserve household energy use	RR	100%	RR	98.1%
	EM	89.2%	OM	92.0%
	AM	87.8%	AM	90.8%
	OM	80.0%	LR	85.7%
	LR	76.2%	EM	83.8%
	Total	86.9%	Total	89.7%
Avoid use of pesticides and chemical	RR	80.0%	OM	76%

ENVIRONMENTAL CONSERVATION BEHAVIOUR	RESPONDENTS' LEVEL OF PARTICIPATION			
	S		SO	
fertilizers	AM	65.5%	AM	63.1%
	LR	61.9%	RR	62.3%
	OM	60.0%	EM	58.6%
	EM	59.5%	LR	49.2%
	Total	64.4%	Total	61.2%
Use low-flow flush toilet	RR	60.0%	RR	60.4%
	LR	47.6%	AM	52.9%
	AM	43.2%	LR	47.6%
	EM	37.8%	EM	43.4%
	OM	33.3%	OM	28.0%
	Total	42.8%	Total	50.1%
Use low impact or non-motorized forms of outdoor recreation	EM	51.4%	RR	58.5%
	RR	50.0%	EM	49.5%
	OM	46.7%	AM	48.1%
	AM	44.6%	OM	44.0%
	LR	33.3%	LR	34.7%
	Total	45.0%	Total	47.7%
Use native plants	OM	53.3%	OM	60.0%
	RR	50.0%	RR	54.7%
	AM	43.9%	LR	49.2%
	LR	38.1%	AM	48.1%
	EM	35.1%	EM	46.5%
	Total	42.8%	Total	49.2%
Use xeriscaping	OM	26.7%	OM	56.0%
	EM	21.6%	RR	41.5%
	AM	20.1%	EM	36.8%
	LR	14.3%	AM	35.5%
	RR	10.0%	LR	33.3%
	Total	19.8%	Total	37.0%
Use solar panels or wind energy	OM	33.3%	AM	28.3%
	EM	24.3%	OM	28.0%
	LR	23.8%	RR	24.5%
	AM	23.0%	EM	24.2%
	RR	10.0%	LR	23.8%
	Total	23.4%	Total	26.6%
Share a ride to work	EM	27.0%	LR	31.7%

ENVIRONMENTAL CONSERVATION BEHAVIOUR	RESPONDENTS' LEVEL OF PARTICIPATION			
	S		SO	
	OM	20.0%	RR	30.2%
	AM	19.4%	OM	28.0%
	LR	19.0%	EM	26.3%
	RR	10.0%	AM	24.2%
	Total	20.3%	Total	26.3%
Bicycle to work	OM	13.3%	LR	14.3%
	EM	10.8%	EM	11.1%
	AM	6.5%	AM	10.2%
	LR	4.8%	OM	8.0%
	RR	0.0%	RR	7.5%
	Total	7.2%	Total	10.5%
Use grey water for watering the lawn	OM	20.0%	AM	11.9%
	AM	6.5%	RR	9.4%
	LR	4.8%	EM	8.1%
	EM	2.7%	OM	8.0%
	RR	0.0%	LR	7.9%
	Total	6.3%	Total	10.3%
Use public transportation	OM	6.7%	RR	13.2%
	EM	5.4%	LR	9.5%
	LR	4.8%	AM	8.5%
	AM	3.6%	EM	6.1%
	RR	0.0%	OM	4.0%
	Total	4.1%	Total	8.4%
Drive a hybrid or "smart car"	AM	0.7%	OM	4.0%
	EM	0.0%	LR	1.6%
	OM	0.0%	AM	1.4%
	LR	0.0%	EM	1.0%
	RR	0.0%	RR	0.0%
	Total	0.5%	Total	1.3%
Other	AM	2.9%	OM	4.0%
	EM	2.7%	RR	3.8%
	OM	0.0%	LR	3.2%
	LR	0.0%	AM	2.7%
	RR	0.0%	EM	2.0%
	Total	2.3%	Total	2.8%

3.3.2.2 Parks & Protected Areas

Answers to questions in the HHS about the Park Canada's (PC) feasibility study for a national park reserve in the Lower Similkameen and South Okanagan area rendered both specific information for new park study, and also further insights into the residents' environmental attitudes and behaviour. It indicated that 73% of the SSO respondents were aware of PC's project: 17.6% were *a little bit aware*; 30.2% *somewhat aware*; and 25.4% *very aware*. S respondents were a bit less aware than SO's; (62.4% compared to 77.6%). In S, the most aware were the RRs and EMs at 81.0%, followed by LRs at 71.4%, then AMs at 56.5%, and the least aware were OMs at 46.7%. SO's most aware resident type was LRs at 89.4%, followed by RRs at 81.1%, then AMs at 76.2%, with EMs and OMs the least aware with both 73.0%.

While a high percentage of awareness existed among SSO respondents, only 38.7% support the new park reserve, of which 29.6% *strongly support* and 9.1% *slightly support*. 15.6% *strongly oppose* the project, 3.8% *slightly oppose*, 9.9% were neutral, while 4.7% *did not know* if they support or oppose, and 27.1%, said they *needed more information* about it. Across resident type and the two valleys, the strongest opposition came from LRs at 36.4%, of which 52.4% were from S and 31.3% from SO. It should be noted that in terms of the location of the park, S would be more affected, particularly lower Similkameen. In SSO, the strongest support was by RRs at 37.5%, followed by OMs at 31.7%, then AMs at 30.1%, EMs at 29.9% and last was LRs at 21.6%.

The number of times the respondents stated they would use the park mirrors the above results. Some 20.8% of SSO respondents stated they would *not use the park at all*, which is roughly equal to the percentage of respondents who would *strongly* to *slightly oppose* the project. Only 8.7% of SSO respondents would *frequently* use the park, 10.9% *regularly (3-6 times/ year).* A large percentage of respondents, some 38.5% would use it *occasionally (1-2 times/ year)*, and the remaining 21.1% said they would use the park *once every few years*. Comparing resident types the reported highest intention to use the park was RRs with 83.9**%**, followed by AMs and EMs with 81.7**%**, then OMs with 77.5**%** and LRs with 60.8**%**.

When asked for the 3 most important benefits of the national park under consideration, based on the number of times mentioned, SSO respondents chose 1st with 43.9% *As a place to experience outdoors*, 2nd with 35.7% *As a peaceful, quiet place*, and 3rd at 26.6% *As a place to bring family and friends*. SSO respondents thought that the least important park benefit was *As a place for learning* at 11.1%. Some 21.2% claimed they would not benefit from the park, which was fairly consistent with the percentage of SSO respondents not supporting the park (19.4%) and will not use the park at all (20.8%). This is also consistent with motivations identified by SSO respondents, where only 24.2% stated *To be near parks* as a very important reason for either moving or remaining in SSO.

All resident types rated *As a place to experience outdoors* as their number one most important new park benefit, with RRs first among resident types at 53.1%, followed by EMs at 45.1%, AMs at 43.3%, OMs at 41.5% and LRs at 38.8%. Only LRs rated 2nd *Will not benefit*, with *As a peaceful, quiet place* the 2nd most important benefit for RRs (43.8%), AMs (38.1%), EMs (32.3%). This was ranked by LRs the 3rd most important benefit. *As a place for recreation and discovery* was 3rd for RRs at 23.4% and OMs at 34.1% , while As a place to bring family and friends was 3rd for AMs at 28.9%) and EMs at 25.6% . But It was for OMs the 2nd most important.

The top three most mentioned outdoor activities in the new park were *Day hiking* at 56.0%, followed by *Roadside sightseeing* at 48.2% then *Camping* at 39.5%. Comparing within resident types, *Day hiking* was the most popular activity in a park among all with EMs leading at 59.2%, followed by AMs (55.8%), then OMs (55.3), LRs (54.7%) and RRs (53.1%). Parallel to the SSO pattern, *Roadside sight seeing* and *Camping* were the 2nd and 3rd most liked activity in a park by OMs (55.3%, 42.1%), AMs (49.1%, 35.4%) and EMs (45.02%, 40.8%) respectively. On the other hand, both LRs and RRs rated slightly higher *Camping* (50.2%) to *Roadside sightseeing* (45.6%) as their 2nd and 3rd most preferred park activity.

In comparing S and SO for these 3 most important park benefits, the 1st two were ranked the same. However the 3rd most important in S at 28.1% of respondents was *As a place for exploration and discovery*, while for SO, at 22%, it was *As a place to bring family and friends*.

Past research on amenity migration shows a general strong interest in and use of public parks and protected areas by amenity migrants, with AMs location being typically highly dependent on the existence of this natural amenity, particularly in economically developed countries. The SSO HHS survey indicated for AMs and across all resident types, parks were valued moderately with a ranking of 10th and 13th respectively, out of 28 choices offered for reasons to migrate to or remain a resident. For local born and raised the existence of parks ranked higher at 8th as a motivator of their residence. While there was high awareness of the potential new national park the support for it seems to correspond with the moderate value respondents gave to parks generally. The obvious exception indicated was for LRs who appear to support parks generally more highly than this new national park. More detailed analysis of the data could test this indication, including for more detailed community specificity.

3.3.3 Community Participation

While AMs are more environmental amenity conserving than LRs, the former participate less in their local community according to both KIS and HHS findings. This pattern corresponds with the more general research on amenity migration for western North America. According to about a quarter of KIS interviewees, this participation characteristic is an important attitudinal and behavioural difference

among AMs, EMs and LRs. Further**,** the same number of interviewees thought that EMs participate more in the community compared to AMs because their source of income is more tied to the local economy. In addition, they reported that EMs are younger people and have younger and more children going to local schools, which involved them in the local community and its culture. Indeed, HHS results also show that AMs are less active in the community compared with LRs and EMs (see Table 7). In addition, there is less community participation in SO than S, which may suggest lower community participation is more of an urban characteristic rather than an AM characteristic *per se*. This parallels the findings above on respondents' environmental bahaviour, where most of the activities identified in general seem to be more common urban practices today, such as xeriscaping, waste separation, energy conservation, etc. Both AMs and SO respondents, who are more culturally urban, scored higher on this aspect than other residence types and also in S.

Regarding increasing more participation of AMs in local communities, most KIS interviewees were of the opinion that public and volunteer entities, such as local councils, schools, Chambers of Commerce, the Legion, had to reach out much more to involve AMs in their communities. Such outreach should become a specific objective or project of such entities.

Table 7. Community Participation Behaviour of SSO Residents

COMMUNITY PARTICIPATION BEHAVIOUR	RESPONDENTS' LEVEL OF PARTICIPATION			
	S		SO	
Attend public hearings	RR	72.7%	RR	57.4%
	EM	59.5%	EM	51.5%
	LR	47.6%	LR	51.5%
	OM	46.7%	AM	50.01%
	AM	44.2%	OM	50.0%
	Total	51.9%	Total	51.2%
Donate money	EM	54.1%	LR	44.1%
	RR	45.5%	EM	42.6%
	AM	38.8%	OM	42.3%
	OM	33.3%	AM	39.3%
	LR	28.6%	RR	31.5%
	Total	43.1%	Total	39.9%
Participate in community meetings	OM	60.0%	OM	57.7%
	LR	57.1%	EM	37.6%
	EM	45.9%	RR	35.2%
	AM	41.5%	AM	34.3%
	RR	36.4%	LR	30.9%
	Total	47.7%	Total	35.7%

COMMUNITY PARTICIPATION BEHAVIOUR	RESPONDENTS' LEVEL OF PARTICIPATION			
	S		SO	
Volunteer time and skills	EM	54.1%	OM	53.8%
	RR	45.5%	EM	39.6%
	LR	42.9%	AM	38.0%
	OM	40.0%	LR	36.8%
	AM	34.0%	RR	31.5%
	Total	41.7%	Total	38.3%

The limited community participation by AMs is not unique to SSO, and may be one of the more unrealized opportunities of AM generally. In fact, when Moss initially developed the AM paradigm in 1986 from a study of Santa Fe, NM (a small town with high environmental and distinct cultural amenities), he observed that many people who were migrating to Santa Fe acted quite similarly to tourists, including having little involvement in local community affairs. AMs being unengaged in the community they move into seems a common characteristic found in AM studies. On the other hand, some are involved, and they also become local leaders.

Interestingly, most KIS interviewees said that AMs in both valleys have developed a sense of belonging to the place, which may be expected to be demonstrated by more community participation than is indicated. However, about half these interviewees also stated that LRs do not have a good relationship with AMs, which may be a reason why they are less involved. Key informants also indicated that LRs typically fear the changes that AMs usually bring and may impose on them. AMs are also resented due to their more sophisticated ways and material wealth. One key informant offered that this situation was typical of more agricultural or traditional societies/ cultures where acceptance of the *Outsider* takes a long time. There are ethnographic studies that corroborate this interpretation. Other key conditions identified in AM related research that discourage greater AM community participation are: 1) resistance to spending money which is a common trait of more rural municipalities, typically due to scarcity of funds; 2) the comparative length of time it takes to undertake tasks in more rural places; 3) less skilled and professional staff in local agencies and organizations, which includes limited global awareness and experience; and 4) language and cultural custom barriers, especially for foreign AMs.

3.3.4 Key Future Issues and Government Action

The most common SSO issues identified for the next 20 year period by key informants were: 1) *Degradation of water and air quality*; 2) *Unmitigated growth pressures*, such as *Lack of affordable housing and Developable land* (especially in SO); 3) *Failing public infrastructure*; 3) *Loss of rural character/ lifestyle*; 4) *Lack of*

economic diversity; 4) *Lack of resources to serve an aging population*; 5) *Lack of ability to embrace change and plan for it*; 6) *Difficulty in finding the balance between AMs and LRs ways of life* ; 7) *Lack of appropriate land use management*; and 8) *Lack of funding*. The key informants thought that appropriate planning and management is essential to mitigate the above issues, which they went on to identify specifically as including: 1) a strategic assessment of how global issues influence the valleys; 2) a community vision; 3) good understanding of the impacts of AM; 4) good resources inventory to see what they have and don't have; 5) a strategy that will promote sustainability; and 6) holistic approach or context for solving problems. In addition, 7) tougher enforcement of laws and regulations are needed and most of all, 8) enlightened political leaders who have the will and determination to act on the necessary changes. The greatest fear of many KIS was the lack of preparedness of local governments to deal with the challenge of managing AM, and a lack of action of political leaders, which would lead to certain environmental degradation and loss of rural character of land.

The HHS results mirror well the above KIS findings, but gives greater specificity. Issues that both S and SO respondents thought will be major (mean ratings from 4.00 to 5.00) within the next 20 years were: *Water quality* (S 4.20; SO 4.36); *Availability of medical services* (S 4.19; SO 4.29); *Public safety and crime* (S 4.14; S0 4.18); *Water infrastructure systems* (S 4.08; SO 4.20); *Air quality* (S 4.08; SO 4.10); *Preservation/ loss of open spaces* (S 4.00; SO 4.10); *Hazard from wildfires and/or pine beetles* (S 4.00; SO 4.08). Salient interregional differences were: SO respondents considered *Sewer systems* a major issue (4.06), while S respondents rated it of moderate importance (mean ratings from 3.00 to 3.99). Ranked minor importance (mean ratings from 1.0 to 2.99) in S was *Public transit*, and for both, *Too slow economic growth*.

Further, the HHS respondents were asked to choose their top 3 priorities from the above issues. For the whole study region, 74.6% of respondents ranked 1st *Availability of medical services* and *Water quality*, with 29.4%; then 2nd *Air quality* with 17.2% and 3rd *Public safety & crime* with 17%. For the S out of the 31% of the respondents replying to this question, *Availability of medical services* is rated 1st, *Water quality* 2nd and *Air quality* came 3rd. On the other hand, out of 69% of SO respondents answering, *Water quality* was 1st priority, *Availability of medical services* 2nd, and *Housing for lower income residents* was 3rd.

A great majority (83.5%) of SSO respondents stated that the local government should do more regarding their top three prioritized issues identified above. However, when asked if local governments have the necessary capability (planning, managerial and financial) to act on the issues, out of 753 respondents who answered in SSO, 28.3% answered *Yes*, 25.1% said *No*, 35.1% answered *Don't know*, and 11.5% had *No opinion*. When asked if local government had the will to act on the issues, out of 736 respondents answering this question, 15.4% answered *Yes*, 25.8% said *No*, 43.1% said *Don't know* and 15.5% had *No opinion*.

Comparing the two valleys indicated the following differences. There were 7% more SO respondents than in S who thought local government was capable to act on their identified problems, and 6% less SO respondents than in S who did not know if local government was capable or not. Larger differences are indicated for EMs and RRs: there were 23.6% more EMs and 15% more RRs in SO than in S who thought local government was capable. The patterns of AMs and LRs were quite similar in the two valleys. However, in regard to the will of local government to act on issues, there were 7.2% less SO respondents than S ones who thought local government had it. There were 4% more AMs, 10% more EMs, and 27.3% more LRs in S than in SO who believed local government had the will to act. One KIS key informant stated that although there are more challenging issues in SO, public officials and local politicians are trying to do something about it. Whereas in S, where the population growth has exceeded SO for the first time in many years, there are no public control measures to deal with this key issue.

The recently formulated RDOS Growth Management Strategy was generally unknown to the interviewees (KIS) and respondents (HHS). In S this was principally because the valley had opted out of participating in the Strategy. At the same time the survey was undertaken the Strategy was too new for most SO respondents to know much about. Nevertheless, a few of KIS were very much aware of it and approved of either the concept or the reported direction it was taking.

4. Next Steps

This survey probably provides the most complete and useful information developed to date in North America on a region's amenity-led migration and local response to this growing force that is changing rural communities and their ecologies. It offers a baseline of knowledge for the strategic next steps to plan for and manage in a sustainable manner in-migration to the Similkameen and South Okanagan Valleys. The next steps will be to formulate for each valley a set of alternative future scenarios of amenity-led change. These scenarios should be plausible, internally consistent, long term and identify key issues for managing amenity-led migration in each valley (see the project's Phase II description for details). The conditions in the two valleys are judged to be different enough that each needs its own scenario formulation for the scenarios to be specific enough for effectively guiding the following tasks: formulation of 1) a strategy, 2) an action plan and 3) a monitoring and assessment tool for implementation for sustaining the quality of local communities in regional context and the integrity of the natural ecological system upon which their future depends.

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Appendix 3

Key Informants' Interpretations of *Quality of Life*

- access to clear air and water;
- good climate;
- slow pace of living;
- environment safe for children;
- beautiful landscape/ natural environment;
- freedom to do what one wants to do in one's own backyard, including no building by-laws;
- an individual existing in harmony with physical and social amenities of an area;
- ability to generate a supportive local economy;
- good people to people relationship;
- basic human rights reasonably assured;
- guaranteed liveable income and good health;
- ability to support a variety of people at different ages and socio-economic levels; and
- higher quality of life experiences, creativity, intimacy and influence.

Amenity-Led Migration in the

Similkameen and South Okanagan Valleys

Phase One: Baseline Migration Surveys

Part 1: Key Informant Survey: Interview Guidelines

Prepared for: Similkameen Valley Planning Society

Prepared and Conducted by: International Amenity Migration Centre

This study is supported by:

British Columbia Real Estate Foundation
Parks Canada
Regional District of Okanagan-Similkameen
Town of Princeton
Village of Keremeos

KEY INFORMANT INTERVIEW GUIDE

Interview Date _____
Time Started _____
Time Ended _____

A. Interviewee Preparation (5-7 min): Explain 1) in-migration: amenity migration (permanent & part-time), economic migration, and migration not resulting from amenity. Also note capital attracted by amenity growth unaccompanied by migration; 2) the purpose of the study; 3) who is conducting the study; and 4) the study region, including advising that in the course of the interview, if the KI wishes to differentiate among parts of the study region (ie. SO, S, upper S, lower S) s/he should do so.

Inform the KI that what s/he says is strictly confidential, and s/he will not be quoted.

B. PERSONAL INFORMATION

Name_____
Position/ Occupation _____
Business Address _____
Tel. _____ Fax: _____
E-mail: _____

C. QUESTIONS

1) Do you think amenity migration phenomenon exists in the study region?

_____

_____

_____

2) What % of the study region's population do you think are amenity migrants (permanent, seasonal, and intermittent?)

2.1) % of total population _____

2.2) permanent _____

2.3) seasonal _____

2.4) intermittent _____

3) Are there other kinds of migrants in the study region aside from amenity migrants? _____

_____

_____

4.1) What do you think are the key motivators of amenity migration in the study area? _____

_____

_____

4.2) The following are the key motivators of amenity migration that are generally identified elsewhere. Are any of these motivators not present here?

4.1.a) superior natural environment _____

4.2.b) cultural differentiation _____

4.3.c) leisure _____

4.4.d) learning (including spirituality) _____

4.5.e) economic gain (secondary) _____

4.6.f) flight from large cities _____

5) How would you rank these motivators in significance for this region, with 1 being the most important?

5.1) superior natural environment _____

5.2) cultural differentiation _____

5.3) leisure _____

5.4) learning (including spirituality) _____

5.5) economic gain (secondary) _____

5.6) flight from large cities _____

6) Do their motivations change over time? For example, recent research indicates that negative aspects of living in large cities and economic gain have increased as key motivations of amenity migrants. Do you think this is true, and is this the case in the study region?

_____

_____

_____

_____

7) Do motivations change with the type of amenity migrant(s)?

_____

_____

_____

(Interviewer to define "local people" before asking question #8: local people are those who have been born and/or raised in the study region. Ask for comment.)

8.1) Are the amenity migrants' motivations the same ones that local have for remaining in the study region?

_____

_____

_____

8.2) Does this differ for SO and S? _____

_____

_____

_____

9.1) What do you think are the key facilitators of amenity migration in the study area? _____

_____

_____

9.2) The following are the key facilitators of amenity migration that are generally identified elsewhere. Are any of these facilitators not present here?

9.2.a) discretionary wealth _____

9.2.b) discretionary time _____

9.2.c) access technology (IC & T) _____

9.2.d) comfort amenities _____

9.3) How would you rank these facilitators in significance for this region, with 1 being the most important?

9.3.a) discretionary wealth _____

9.3.b) discretionary time _____

9.3.c) access technology (IC & T) _____

9.3.d) comfort amenities _____

10) Do these facilitators change over time? For example, research indicates that amenity migrants have less discretionary time than in the past due to computers

and internet allowing them increased work access (including work in their homes). But this IC technology also allows them to locate almost anywhere as place-based work becomes less important. In addition, IC technology has created more discretionary wealth for some. _____

_____

_____

_____

11) Do the facilitators differ by type of amenity migrant:

11.1) permanent _____

_____

11.2) seasonal _____

_____

11.3) intermittent _____

_____

12) Do the amenity migrants' facilitators also facilitate local people remaining?

_____

_____

_____

13.1) Where do you think the amenity migrants are coming from, and roughly what % do you think come from, let's say: Alberta, BC, rest of Canada, USA and elsewhere?

PLACE	Total AM	AM-Permanent	AM-Seasonal	AM-Intermittent
Alberta				
BC				

rest of Canada				
USA				
elsewhere				

13.2) Do you think this differs with types of AM (permanent, seasonal, intermittent) (Interviewer use table above) _____

14) Can you estimate when the study region start to attract amenity migrants?

_____

_____

_____

15) Why do you think amenity migrants began moving here at that time?

_____

_____

_____

16) How long do you think this condition will continue? _____

_____

_____

_____

17) Research, especially in the western USA, indicates that from about the mid-1980s, natural or environmental amenities became more valued in themselves or more as is, and started replacing more traditional use of resources, particularly mining, timber, agriculture, etc. Is this true in the study region? If so, when?

_____

_____

_____

18) How does amenity migration compare to more traditional economic activities as means or tool for economic development?

_____

_____

_____

_____

19.1) Research in the USA also shows that natural parks and protected areas attract AMs whose economic activity may or may not depend on a place's amenity attributes, such as computer software developers, health care, art galleries, restaurants, etc. Is this true here? If so, what kind of economic activity has been generated? _____

_____

_____

_____

19.2) Does it differ for SO & S? _____

_____

_____

20) Is the study region becoming a location of new or expanded (suggest following list)

20.1) formal educational activities/institutions _____

20.2) non-formal educational activities/institutions _____

20.3) other information/ knowledge intensive activities _____

20.4) artistic activities (performing, literary, fine arts) _____

20.5) Do you have other observations? _____

21) What are improvements in the IC (information and communications) and transportation technology in the study region, and since when?

_____

_____

_____

22) How important to income is this technology for:

22.1) amenity migrants _____

_____

22.2) local people _____

_____

23) For a sustainable economy, to what extent does or should your community work toward attracting new, external capital or developing a local community-based economy to generate jobs and incomes (latter strategies attempt to minimize dependence on external actors and organizations by promoting local ownership and control of local resources: land, amenities/natural resources)?

_____

_____

_____

_____

(If KI asks how to develop local community-based economy, say we don't have enough time to discuss this but s/he may wish to read Michael Shuman (1998) *Going Local: Creating Self-Reliant Communities in a Global Age*, published by The Free Press.)

(Interviewer introduces next part of the guide with "In the next questions I will ask you to focus on the values and behaviours of amenity migrants and local people and responses to them".)

24) Do amenity migrants behave differently from local people? How?

_____

_____

_____

25) Do part-time or second-home owners behave differently from permanent amenity migrants? How? _____

_____

_____

26) How about compared to tourists? _____

_____

_____

_____

27) Do economic migrants behave differently from:

27.1) amenity migrants _____

_____

27.2) local people _____

_____

28) For better understanding and management of amenity attributes, should part-time residents, specifically second-home owners, be categorized as tourists or

amenity migrants? Why? _____

_____

_____

_____

29) What is the attitude of the local people of the study region toward amenity migrants, and why? _____

_____

_____

_____

30) Does their attitude differ toward permanent and part-time amenity migrants? If so, how? _____

_____

_____

_____

31) Does their attitude differ toward tourists and amenity migrants? If so, how?

_____

_____

_____

32) Is amenity migration an opportunity or a threat to the study region; and does it differ for SO and S bioregions? Why?

_____

_____

_____

_____

33) Are these opportunities and threats being realized? Why and why not?

_____

_____

_____

_____

34) Are there differences in threats and opportunities between permanent AM and part-time AM? Why and how? _____

_____

_____

_____

35) Are the opportunities and threats of amenity migrants the same or different as those from economic migrants? _____

_____

_____

_____

36) Are the AM opportunities and threats different from local people's effects?

_____

_____

_____

_____

37) Amenity migration has often been characterized as bringing about a reduction of "quality of life" in the destination. What is your opinion about this?

_____

_____

_____

_____

38) How do you describe or define "quality of life"? _____

_____

_____

_____

39) There are indications that amenity migrants tend toward two types: amenity conservers and amenity consumers. Can you suggest policy tools that may attract the conservers and dissuade the consumers from migrating to the study region?

_____

_____

_____

_____

40) What, if anything, do you think should be done to modify the negative impacts of amenity migrants on amenities? _____

_____

_____

_____

_____

41) Do you think amenity migrants have developed a sense of belonging to the study region, or a part of it? And is there a difference between the more permanent and part-time types? If yes, in what ways are they exhibited?

_____

_____

_____

_____

42) If "belonging" is weak, how can it be strengthened? _____

_____

_____

_____

_____

43) What do you think will cause the amenity migrants to leave the study region or cease to come? _____

_____

_____

_____

44) Are amenity migrants already leaving the study region? _____

_____

_____

_____

45) Is the SO Growth Strategy's Act bringing about coordination on issues that cross municipal boundaries and has it brought resources from provincial ministries and agencies to implement regional and municipal projects and programmes? (The Growth Strategy Act became a law in 1995.)

_____

_____

_____

_____

46) In your opinion, what are the key issues that the study region may face in the next 20 years? Does it differ for SO and S? _____

_____

_____

_____

_____

47) Should the study region's local governments do more regarding these issues, and what should they do? Does it differ for SO and S?

_____

_____

_____

_____

48) Do you find that the "quality of life" in the study region is: improving, holding steady or declining? Does it differ for SO and S?

_____

_____

_____

_____

49) What is your greatest fear for the study region's future? Does it differ for SO and S? _____

_____

_____

_____

50) Are you an amenity migrant, or considering becoming one elsewhere?

_____

_____

_____

Interviewer's Name: _____

Remarks: _____

_____

_____

_____

_____

Dear Resident of the Similkameen and South Okanagan Valleys:

You have been randomly selected for a survey conducted by the Similkameen Valley Planning Society with the assistance of the Regional District Okanagan Similkameen and its member municipalities.

The movement of people to the South Okanagan and Similkameen Valleys is one of the main sources of growth and development. This survey will assist communities to understand how in-migration is shaping our Valleys and how residents feel about it.

Recently, researchers have identified a type of migrant to rural areas called an "amenity migrant." Amenity migrants are people who move permanently or part-time to the countryside, or to small towns and villages attracted by environmental and/or cultural amenities. In the Similkameen and South Okanagan Valleys our amenities are beautiful scenery, parks and wilderness, working farms, ranches and vineyards, great opportunities for outdoor recreation, rural lifestyle and friendly people, arts and music, and native cultures. We distinguish "amenity migrants" from "economic migrants". Economic migrants are people who move to our area primarily for income and other economic reasons.

Whether you were born and/or raised here, or a migrant (permanent or second home resident) to our area, we want you to complete the survey below. The questionnaire is intended to gather information about how in-migration is affecting our social, economic and cultural life and the quality of our environment. You will have an opportunity to tell us what you think are the important issues related to in-migration, growth and development. The information from this survey will assist us in learning considerably more about this amenity-led migration and its potential positive and negative effects on our communities and environment.

This questionnaire is distributed in Penticton, Okanagan Falls, Oliver, Osoyoos, Areas A, C and D of the Regional District Okanagan Similkameen and all communities in Similkameen Valley.

Thank you for taking approximately 25 minutes to complete the survey and for returning it in the stamped, addressed envelope provided. We prefer that surveys are returned by July 31, but we will accept them up until August 31.

In order to protect your privacy, please do NOT write your name on this questionnaire. Individual surveys will not be available to any agency.

AMENITY-LED MIGRATION IN THE SIMILKAMEEN AND SOUTH OKANAGAN VALLEYS

Household Survey

*In order to protect your privacy, please **DO NOT** write your name on this questionnaire.*
***Valley** refers to either Similkameen or South Okanagan Valley.*

---

1) Check if you are an

_____ *owner resident* _____ *second-home owner* _____ *renter*

in

Similkameen Valley

_____ *a) Keremeos*
_____ *b) Princeton*
_____ *c) rural lower Similkameen (Area B or G)*
_____ *d) rural upper Similkameen (Area H)*

South Okanagan Valley

_____ *e) Oliver or Okanagan Falls*
_____ *f) Osoyoos*
_____ *g) Penticton*
_____ *h) rural South Okanagan (Area A, C, D)*

2) How would you describe your residence here?

_____ *a) Permanent (reside most of the time here)*
_____ *b) Seasonal (reside for one or several periods each year here, such as a second-home owner residing for summer.)*
_____ *c) Intermittent (moves between/ among residences more frequently, such as a person residing in Vancouver and staying in her/his second or permanent home week-ends.)*
_____ *d) Other, please specify* _____

3) Are you a (**please select just one**)

_____ *a) **Local person** (born and/or raised in the Valley);*
_____ *b) **Returned resident** (left the Valley and returned as an adult)*
_____ *c) **Amenity migrant** (a person who **primarily** moved here because of the natural or environmental amenities such as mountains, lakes, rivers, forest, climate and recreational opportunities; and/or socio-cultural amenities such as safe/friendly communities, rural values and lifestyle. Your **residence** can be **permanent, seasonal or intermittent**. For definitions, please refer to question #2.)*
_____ *d) **Economic migrant** (a person who **primarily** moved here for a job, to start a business, or other economic reasons);*
_____ *e) **Other**, please specify* _____

4) If you came to the Valley as an adult (**migrant** or **returned resident**), what were your reasons for coming and how important were those reasons to you at the time? **OR** if you are a **local person** what are your reasons for remaining in the Valley?

	Very important	**Somewhat important**	**Not important (or irrelevant)**
For a job	___	___	___
To pursue a business opportunity	___	___	___
For peace and quiet	___	___	___
To live in an area of diverse plants/wildlife	___	___	___
To be near parks	___	___	___
To enjoy clean air	___	___	___
To enjoy clean rivers and lakes	___	___	___
Because of the climate	___	___	___
Because of mountains and mountain views	___	___	___
To be near abundant outdoor recreational opportunities (egs. golf, fishing, skiing)	___	___	___
To be near Crown land for motorized recreation (trail bikes, ATVs)	___	___	___
To be near Crown land for hunting/fishing	___	___	___
Because of diverse outdoor recreational opportunities (eg. golf, swimming, skiing)	___	___	___
Because of the wineries	___	___	___
To be in farm or ranch country	___	___	___
To live in a rural community	___	___	___
To be close to family or partner	___	___	___
To have a lower cost of living	___	___	___
Because of cheaper property	___	___	___
To retire	___	___	___
To prepare for retirement	___	___	___
Good facilities for seniors	___	___	___
To be in a safer place	___	___	___
Because of its comfort amenities (restaurants, shops, entertainment, walk to most services)	___	___	___
Access to health care	___	___	___
To enjoy the music or cultural scene	___	___	___
Because it is culturally distinct	___	___	___
Because of spiritual attraction of landscape	___	___	___
Other: _____	___	___	___

IMPORTANT: *If you are a **local person** (born and/ or raised in the valley) **who never resided outside of the valley (school, military service, etc. excepted), please skip to question #11**. If you are an **amenity or economic migrant**, **or** a **returned resident**, please continue.*

5) If you are a person who spends time in a 2nd home here, do you consider yourself a

_____ *a) Resident* _____ *b) Part-time resident*
_____ *c) Tourist* _____ *d) Other*
_____ *e)* ***Not applicable***

6) If you own a second home in the Valley, do you intend to retire or reside in it permanently?

_____ *a) Yes* _____ *b) No*
_____ *c) Don't know* _____*d)* ***Not a second home owner***

7) When and how you migrated:

a) In what year did you first arrive or return here, more or less?

_____ *a) First arrived* _____ *b) Returned*

b) Did you first learn about this valley as a tourist and then decide to reside here, **or** were you seeking a new place to live and migrated directly **or** did you learn about this valley some other way (example: while on business, visiting family)?

_____ *a) As a tourist first*
_____ *b) As a direct migrant*
_____ *c) Other, please specify* _____

8) What was your place of residence before you came to the Valley?

Country name: _____
Province or state name: _____
City or town (if you lived in a city or town) name: _____
Nearest city or town (if you lived in the country) name: _____

9) When you came to the Valley to live, if you did not have a job waiting for you, how did you expect to derive an income? Were you

_____ *a) Drawing a pension*
_____ *b) Able to live from your capital and investments*
_____ *c) Working but able to live in places distant from where your work was performed (for example, if you were an airline pilot)*
_____ *d) A business person who could settle in several places*
_____ *e) A person who decided to come to the Valley and worry about how to earn a living afterward*
_____ *f) Other, please specify:* _____

10) No matter how or why you first came to the Valley, have you had job or business opportunities to move elsewhere and you turned them down because you preferred to continue to live here?

_____ *a) Yes* _____ *b) No*

11) Recall, an amenity migrant is a person who selects a place to live primarily because of its natural and/or cultural amenities. In your opinion, is amenity migration an opportunity or a threat here? Why?

_____ *a) Opportunity* _____

_____

_____ *b) Threat* _____

_____

_____ *c) No opinion*

Research has shown a connection between Parks and amenity migration. That is why we ask you questions about a proposed National Park.

12) There is a proposal for a new National Park in the South Okanagan-Lower Similkameen area. How aware of you of this proposed park?

_____ *a) Not aware at all*
_____ *b) A little bit aware*
_____ *c) Somewhat aware*
_____ *d) Very aware*

13) Do you support or oppose the establishment of this National Park?

_____ *a) Strongly oppose*
_____ *b) Slightly oppose*
_____ *c) Neither oppose nor support*
_____ *d) Slightly support*
_____ *d) Strongly support*
_____ *e) Don't know*
_____ *f) Need more information*

14) If a National Park was created, how will it affect your desire to remain living in the Valley?

_____ *a) Strongly decrease*
_____ *b) Slightly decrease*
_____ *c) Neither decrease nor increase*
_____ *d) Slightly increase*
_____ *e) Strongly increase*
_____ *f) Don't know*

15) If you are an amenity migrant and this National Park had been established before you moved here, how much would the Park have affected your desire to move here?

_____ *a) Strongly decrease*
_____ *b) Slightly decrease*
_____ *c) Neither decrease nor increase*
_____ *g)* ***Not an amenity migrant***
_____ *d) Slightly increase*
_____ *e) Strongly increase*
_____ *f) Don't know*

16) If this National Park is created, how often do you think you would use the park?

_____ *a) Not at all*
_____ *b) Once every few years*
_____ *c) Occasionally (1 to 2 times per year)*
_____ *d) Regularly (3 to 6 times per year)*
_____ *e) Frequently (7 or more times per year)*

17a) If this National Park is created, how may it benefit you (and your family)? Please check the **three most** important benefits.

_____ *a) As a place to experience the outdoors*
_____ *b) As a place to escape from the ordinary*
_____ *c) As a peaceful, quiet place*
_____ *d) As a place to bring family and friends*
_____ *e) As a place for recreation*
_____ *f) As a place for learning*
_____ *g) As a place for exploration and discovery*

_____ *h) As a place to get fit or stay in shape*
_____ *i) Will not benefit*
_____ *j Others, please specify:* _____
_____

17b) If this National Park was created, which of the following activities would you use it for? (**Please check all that apply**.)

_____ day hiking
_____ overnight hiking with backpacks
_____ roadside sightseeing
_____ canoeing/rafting/kayaking
_____ bird watching/ wildlife watching
_____ horseback riding
_____ star-gazing
_____ natural history appreciation/interpretation
_____ cultural history appreciation/interpretation
_____ other, please specify: _____

____ camping
____ swimming
____ rock climbing
____ fishing
____ bicycling
____ skiing

18) Below is a list of key issues Similkameen and South Okanagan Valleys may face in the next 20 years. Please circle how major or minor you think the key issue will be.

Issues	**minor**	**<< Rating>>**			**major**
Developing a diverse economy	1	2	3	4	5
Values and behaviours of amenity migrants	1	2	3	4	5
Too rapid economic growth	1	2	3	4	5
Too slow economic growth	1	2	3	4	5
Uncontrolled, haphazard economic growth	1	2	3	4	5
Availability of liveable wage jobs	1	2	3	4	5
Preservation/ loss of open spaces	1	2	3	4	5
Preservation/ loss of farmland	1	2	3	4	5
Lack of land for development	1	2	3	4	5
Hazard from wild fires and/or pine beetles	1	2	3	4	5
Air quality	1	2	3	4	5
Water quality	1	2	3	4	5
Traffic congestion	1	2	3	4	5
Water infrastructure systems	1	2	3	4	5
Sewer systems	1	2	3	4	5
Public transit, e.g. a bus system	1	2	3	4	5
Sidewalks, trails, bike lanes	1	2	3	4	5
Community appearance	1	2	3	4	5
Public recreation facilities, parks	1	2	3	4	5
Services for seniors	1	2	3	4	5
Public safety & crime	1	2	3	4	5
Housing for lower income residents	1	2	3	4	5
Housing for seniors	1	2	3	4	5
Improvement of telecommunications infrastructure	1	2	3	4	5
Loss of small town or rural life style	1	2	3	4	5

Availability of medical services	1	2	3	4	5
Fossil fuels shortage	1	2	3	4	5
Food security	1	2	3	4	5
Others, please specify: _____	1	2	3	4	5
_____	1	2	3	4	5

19) Should Similkameen or South Okanagan local governments do more regarding these issues?

_____ *a) Yes* _____ *b) No*

If yes, which of the above issues rank as the top three for local government attention? Top 3 key issues: (**Please choose from the above list**.)

1. _____
2. _____
3. _____

20) In your opinion, does your local government have the necessary capability (planning, managerial and financial) and the will to act on the top 3 key issues you identified above?

Capability:

_____ *a) Yes* _____ *b) No*
_____ *c) Don't know* _____ *d) No opinion*

Will:

_____ *a) Yes* _____ *b) No*
_____ *c) Don't know* _____ *d) No opinion*

21) Do you find that the quality of life in the Valley is:

_____ *a) Improving* _____ *b) Holding steady*
_____ *c) Declining* _____ *d) No opinion*

22) In the table below is a list of things that might decrease your quality of life. **For those things that would decrease your quality of life,** please circle the number that rates how minor or major the issue is to you. Also, please indicate if the issue **could** cause you to leave the Valley,

Issues	**minor**		**<< Rating>>**		**major**	**Would you leave?**	
a) High cost of living	1	2	3	4	5	yes	no
b) Can't make a decent living	1	2	3	4	5	yes	no
c) Limited access to recreational facilities	1	2	3	4	5	yes	no
d) Rate of growth: too fast	1	2	3	4	5	yes	no
e) Rate of growth: too slow	1	2	3	4	5	yes	no
f) Level of crime	1	2	3	4	5	yes	no
g) Shortage of water	1	2	3	4	5	yes	no
h) Loss of wildlife habitat	1	2	3	4	5	yes	no
i) Environmental degradation	1	2	3	4	5	yes	no

j) Can't afford to own a property	1 2 3 4 5	yes no
k) Lack of health care facilities	1 2 3 4 5	yes no
l) Climate change	1 2 3 4 5	yes no
m) Other: _____	1 2 3 4 5	yes no
n) Other:_____	1 2 3 4 5	yes no

23) How do you personally sustain the environment? **Please check all that apply**.

_____ *a) Separate recyclable garbage*
_____ *b) Use solar panels or wind energy*
_____ *c) Use native plants*
_____ *d) Avoid use of pesticides and chemical fertilizers*
_____ *e) Conserve household energy use*
_____ *f) Use low-flow flush toilet*
_____ *g) Use low impact or non-motorized forms of outdoor recreation*
_____ *h) Use xeriscaping*
_____ *i) Use grey water for watering the lawn*
_____ *j) Use public transportation*
_____ *k) Share a ride to work*
_____ *l) Bicycle to work*
_____ *m) Drive a hybrid or "smart car"*
_____ *n) Others, please specify* _____
_____

24) What actions have you taken in the past to resolve community issues or issues that matter to you most? **Please check all that apply**.

_____ *a) Attend public hearings*
_____ *b) Participate in community meetings*
_____ *c) Volunteer time and skills*
_____ *d) Donate money*
_____ *e) Others, please specify* _____
_____

25) Amenity migration status:

a) If you **are not** an amenity migrant, are you considering becoming one elsewhere? If so, where?

_____ *Yes ; where* _____
_____ *No* **OR**

b) If you **are** an amenity migrant, are you considering becoming one elsewhere? If so, where?

_____ *Yes ; where* _____
_____ *No* **OR**

c) Have you been an amenity migrant elsewhere? If so, where?
_____ *Yes ; where* _____
_____ *No*

26) Age and gender:

a) Your age (in years) is best described as:

_____*18-34* _____ *35-54* _____ *55-64* _____ *65-74* _____ *75 or older*

b) Are you ___ ***male*** or ___ ***female*****?**

27) Check the category that best describes your highest level of education.

____ *Some High School* ____ *High School Graduate* ____ *Some College*
____ *Associate of Arts Degree* ____ *Bachelor's Degree* _____ *Some Graduate School*
____ *Master's Degree* _____ *Beyond a Master's Degree*

28) What best describes your household?

_____ a) Family expecting to have children
_____ *b) Single person or couple with children*
_____ *c) Single person or couple with children gone from the home*
_____ *d) Single person or couple with no children or intention of children*
_____ *e) Semi-retired individual or couple*
_____ *f) Retired individual or couple*
_____ *g) Other, please specify* _____

29) Are you currently:

_____ *a) Employed* _____ *b) Self-employed*
_____ *c) Under-employed* _____ *d) Unemployed*
_____ *e) Semi-retired* _____ *f) Retired*

30) If you own your residence, for how much would it sell, do you think?

$ _____ _____ *Don't know*

31) How much did your home and property cost, including improvements since you arrived here?

$ _____ _____ *Don't want to say*

32) Did you purchase a property with a home on it, and replace the home with a newly built home?

_____ *a) Yes* _____ *new home square feet*
_____ *b) No*

33) Did you purchase a vacant lot and build a home on it?

_____ *a) Yes* _____ *new home square feet*
_____ *b) No*

34) How large is the residential property you currently live on?

_____ *a) Less than 1/2 acre*
_____ *b) Between 1/2 acre and 1.0 acre*
_____ *c) Between 1.1 acres and 5.0 acres*
_____ *d) Between 5.1 acres and 10.0 acres*
_____ *e) Over 10.1 acres*

35) What kind of dwelling do you currently rent or own in the Valley?

_____ *a) Apartment*
_____ *b) Condominium*
_____ *c) Town house*
_____ *d) Single-family or Detached*
_____ *e) Mobile home*
_____ *f) Other, please specify* _____

36) Have you sub-divided or do you plan to sub-divide your residential property?

_____ *a) Yes*
_____ *b) No*

37) Roughly, what is your before-tax annual household income?

*$*_____ ___*Don't know* ___*Don't want to say*

38) Have you ever started up a business in the Valley? **(If no, you have finished the survey.)**
_____*Yes* _____ *No*

39) How much did you invest in your business since you arrived in the Valley?
$ _____

40) How many people, excluding yourself, does or did your business employ?
_____

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THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY.

PLEASE RETURN IT AT YOUR EARLIEST CONVENIENCE USING THE POSTAGE PAID ENVELOPE.

RESULTS FROM THIS SURVEY WILL BE CIRCULATED IN MUNICIPAL NOTICES OR REPORTED IN SOME OTHER PUBLIC FASHION.