

**MANAGING RESIDENTIAL TOURISM IN BRITISH
COLUMBIA'S SOUTH OKANAGAN**

by

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ABSTRACT

This study explores the impacts of residential tourism in British Columbia's South Okanagan and seeks an understanding of how this particular branch of tourism has impacted the rural landscape. A great deal of residential tourists owned property in rural areas with upwards of 20% of the homes within the Agricultural Land Reserve occupied on only a part-time basis. Although previous literature (e.g. Moss, 2006) hypothesized that the appeal of picturesque landscapes promotes semi-permanent migration, this was only partially true for residential tourists in the South Okanagan. Built amenities combined with a favourable climate were the most frequently cited draws. Additionally, residential tourists were found to drive urban expansion into rural areas. Preventing this urban expansion was particularly difficult due to the regional governance structure found in the South Okanagan.

Keywords: Tourism, Management, Residential Tourism, Residential Tourists, Amenity Migration, South Okanagan, Osoyoos, ALR, Regional Government

QUOTATION

An irony of increased environmental awareness in a free-market society is the commodification of the environment, so that demand for a piece of the action is chopping it up into one-to-five-acre fenced lots

Laurence Moss, 2003

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ABBREVIATIONS

AAP	Agricultural Area Plan
ALC	Agricultural Land Commission
ALR	Agricultural Land Reserve
BC	British Columbia
DPA	Development Permit Area
GIS	Geographic Information System
MoU	Memorandum of Understanding
OCF	Official Community Plan
RDOS	Regional District of the Okanagan Similkameen
RGS	Regional Growth Strategy
RT	Residential Tourism
RTs	Residential Tourists
SVPS	Similkameen Valley Planning Society
UGB	Urban Growth Boundary

CHAPTER 1: INTRODUCTION

1.1 Research Rationale

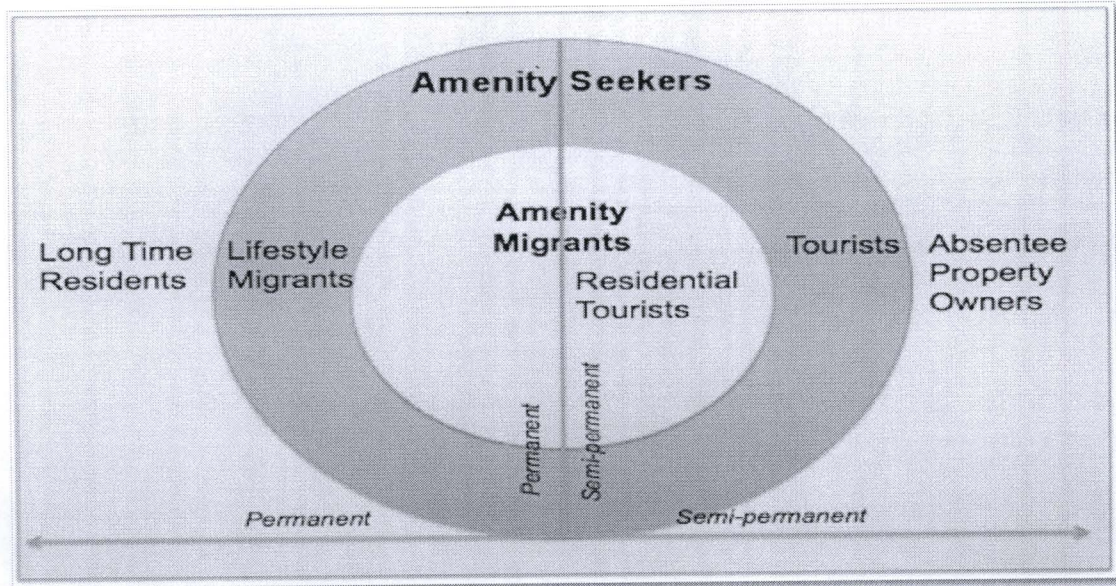
There is a long tradition of governments working with industry partners to stimulate economic growth and associated quality of life benefits for regional and community stakeholders. Over the past two decades, these public-private coalitions have increasingly incorporated tourism related residential real-estate development into the mix of strategies designed to increase and extend the benefits of tourism investment. The underlying strategic position is that tourists and other 'amenity seeking' visitors purchasing residential property in tourism regions provide a broader, deeper and extended range of economic benefits to such areas than would otherwise be possible. Increasingly the challenge with this strategy is ensuring that tourism residential development does not jeopardize the underlying economic, environmental and social character of the host region. This research explores this challenge using a case study of a rural region of British Columbia that has experienced such residential growth increasingly over the past decade. Specifically, this research examines the impacts amenity seeking residents (identified as 'residential tourists') have on the rural landscape and seeks an understanding of these impacts as they relate to larger issues of growth management.

Depending on the context, amenity seeking residents are variously referred to as: residential tourists, quality of life migrants, and/or amenity migrants (McWatters, 2009). Some researchers (e.g. Gill and Williams, 2007)

have gone further, referring to them as tourism-led amenity migrants. Despite some similarities in these terms, for strategic planning and research purposes each refers to a specific subset of the residential property marketplace. As such it is important to clarify their respective meanings so as to avoid oversimplifying the phenomenon. Moss (2006), for example, identifies these property owners as being either permanent or semi-permanent migrants, and includes retirement migrants and second-home owners in his classification. For him, the key differentiator is intent – their semi-permanent or permanent relocation (and subsequent property purchase) is primarily attributed to quality of life issues that are unrelated to employment. This study focuses on semi-permanent migrants who utilize their property for consumption-oriented purposes. These semi-permanent residential property owners represent a subset of Moss' "amenity migrants," and, for the purposes of this research, are referred to as residential tourists¹ (RTs). While a substantial literature on the closely related phenomenon of amenity migration exists, there is much less written on the effects and challenges of RT development. However, what does exist parallels and is complemented by available amenity migration research. Figure 1 attempts to place residential tourists within a spectrum of common terms describing 'amenity-seeking' permanent and semi-permanent residents.

¹ Residential Tourism = RT, Residential Tourists = RTs

Figure 1 – Permanence and Property Ownership



Several researchers (e.g. Williams and Hall, 2000; McWatters, 2009) suggest that links exist between tourism and various forms of semi permanent and permanent migration. Quantifying such connections for specific regions is extremely difficult and involves understanding the intentions of these migrants with respect to changing locales. Although academics (e.g. Chipeniuk, 2004) debate the role tourism plays in semi permanent and permanent migration, it is a moot point for local planners and managers. While tourism's direct role as a facilitator of semi-permanent and permanent migration may be causally unclear, it is evident over the past decade that the influx of permanent and semi-permanent residents into the case study region, and other high amenity regions, is more pronounced than for the province as a whole (Table 1)

Table 1: Population growth in select BC resort communities, 1996-2006.

Place	Pop 1996	Pop 2006	% Change
Whistler	7,172	9,248	22.5
Osoyoos	4,127	4,752	13.2
Tofino	1,170	1,750	33.2
Invermere	2,687	3,046	11.8
BC	3,724,500	4,113,487	9.5

(Source: Statistics Canada, 1996, 2006).

The effects of these migrations, however, go beyond what can be read off a census report or inferred through academic literature. An influx of RTs, for example, typically with higher levels of education and greater financial means (Phillips, 2002), has the potential to cause lasting social impacts (Costella, 2006) and dramatically altered landscapes. In rural communities, for instance, an increase of RTs searching for their piece of paradise can drive up land prices and tempt agricultural landowners to convert and sell their land for residential purposes. With agri-tourism becoming increasingly popular in British Columbia (Tourism BC, 2004), many rural communities are faced with the challenge of balancing the demands of tourists and residential tourists with sustaining working agricultural landscapes.

1.2 Research Objectives and Questions

As part of a larger frame and agenda of research work proposed by Gill and Williams (2007), this particular research study seeks to understand the impacts of RT in British Columbia's South Okanagan. Specifically, the study addresses the following questions:

1. What role does the rural landscape play in attracting RTs and tourists?

2. To what extent is RT impacting the agricultural landscapes in the case study region?
3. Are the pressures of residential tourism adequately addressed with existing land-use management strategies? Are new strategies and/or methods required to address these pressures?

1.3 Research Approach

1.3.1 Literature Review

A review of academic literature related to residential tourism, amenity migration, and various forms of consumption-oriented migration provided the theoretical background for the formulation of research objectives. It specifically situates the phenomenon of RT within a rural, agricultural environment. The first portion defines RT and highlights its transient character and planning issues. The second section positions the research within a larger planning framework and identifies themes to be explored in the study.

1.3.2 Case Study and Method

An empirical case study of BC's South Okanagan (located within the Okanagan-Similkameen Regional District) informs the research's findings. The primary method of data collection is a series of semi-structured interview (see: Chapter 3). Respondents include politicians, local and regional planners, long-time farmers, winery owner/operators, and realtors working and residing within the Okanagan-Similkameen. Information obtained from these semi-structured interviews is combined with property tax assessment data and various secondary information sources (e.g. planning documents, community surveys, newspapers, etc) to meet the study's objectives and answer the research questions.

1.4 Research Significance

This report contributes findings to the growing literature on residential tourism and consumption-oriented migration in general within BC. First, it empirically highlights the extent and prevalence of RTs within tourism-oriented communities and explores some of the practical planning and management challenges and potential solutions for dealing with these issues. Few studies have addressed regional governance options related to the management of RT pressures.

Second, this report examines the role landscape plays in attracting RTs. Previous research on amenity migration (e.g. Moss, 2006; Lynch, 2006; Nelson, 2006), for instance, assumed landscape was a primary driver in determining the destination choice. This research suggests that RT relocation decisions are often more nuanced and influenced by a variety of factors particular to this market group.

Finally, exploring RT within the South Okanagan's rural, agricultural landscape provides a unique perspective on a form of semi-permanent migration that is still relatively unknown amongst planners and local decision-makers in North America. (Chipeniuk, 2004). Lessons from a number of British Columbia's tourist-oriented communities (e.g. Ucluelet, Whistler) demonstrate that planners, researchers, and local government should not only recognize the opportunity and challenges associated with RT flows, but develop more sophisticated and deliberate strategies to leverage them to form positive community legacies.

However, before local governments can begin to reframe the *problem* of RT into an *opportunity*, they must have an indepth understanding of their current difficulties as they pertain to the management of RT. While this report focuses on how RTs alter the landscape and create a changed sense of place, the insights provided are directly related to a number of growth management issues that address both social and economic impacts throughout the South Okanagan.

1.5 Report Structure

This report is divided into six chapters. Chapter Two presents a literature review of various forms of semi-permanent migration (e.g. amenity migration, residential tourism) and places these phenomena within a rural setting. The first section of Chapter Two reviews background literature and attempts to define RT. Its second section builds a framework that guides the literature review and serves as a basis for the line of questioning used in key-informant interviews. Chapter Three describes the research methods employed and provides a justification of the case study area chosen. Chapter Four provides an analysis of interview data and secondary data as they related to the study's objectives and questions. Chapter Five places the study's findings within the broader literature and identifies its significance for planners and decision makers. Chapter Six uses key conclusions of the study as a springboard for a discussion on possible avenues of future research on residential tourism.

CHAPTER 2: LITERATURE REVIEW

2.1 Conceptualizing Residential Tourism

Definitions of various forms of semi-permanent migration are elusive in the tourism and planning literature, and this elusivity has led to inertia in dealing with the management of this phenomenon. For example, Chipeniuk (2004) discovered that planners and local decision-makers were largely unaware of the term amenity migration or amenity migrant, even when the phenomenon was prominent within their community. This researcher encountered a similar lack of awareness of the term residential tourism and its implications throughout the South Okanagan. Understanding more about the meaning and significance of residential tourism from a planning and management perspective is critical to the longer term well-being of many communities hosting such development.

Understanding and disentangling the various aspects of semi-permanent migration as it relates to RT is a difficult task. According to Pampel (1984), migration has increasingly been influenced by personal preference for place rather than economic conditions. Some of the more important 'place preferences' include a favourable climate, picturesque landscape, built amenities, recreation opportunities, and family ties (Casado-Diaz, 1999). RTs seeking these place preferences are often referred to as second-home owners (see, for example: Pampel, 1984; Jaakson, 1986), despite the fact that the term 'second-home owner' does not truly capture the motives of RTs. While axiomatic that RT

residences are almost exclusively second (or third) homes, RTs use their secondary homes primarily as vacation residences. Mazon (2006) for example, argues that the “investment of buying a secondary home involves making the most of it by using it or renting it out” (pp.91). Importantly, this usage does not preclude other uses for a second-home (e.g. rental property, investment property), although Mazon found that second homes used by RTs were far less frequently used as rental properties. While Mazon’s discussion of RT lead him to conclude that RTs demonstrated a high degree of attachment to their destination, some form of semi-permanent migration driven by ‘place preference’ remains a necessary classification of RT.

Other studies have examined semi-permanent migration in terms of its effects on host communities (e.g. Lynch, 2006), its drivers (e.g. Williams et al, 2000), and its relationship to tourism (e.g. Kuentzel and Ramaswamy, 2005). However, rarely have they clearly defined the phenomenon. Amenity migration, for example, is often broadly conceptualized as consumption led migration that may or may not be facilitated by tourism. This definition rarely goes beyond the movement of people to include the movement of their financial capital along with knowledge and expertise. For example, Hall and Williams (2002) identified amenity migration as permanent and semi-permanent human movements to areas of high quality recreational and tourism resources. Moss (2006) defines amenity migration as “the migration to places that people perceive as having greater environmental quality and differentiated culture” (p.3). In fact, Moss’ (2006) book entitled “The Amenity Migrants” fails to provide a more substantive definition than those previously cited. Nor do any of the other book’s contributors

exploring the changing demographics (Nelson, 2006), preferred landscapes (Lynch, 2006), and cultures (Romella, 2006) of these migrants. Hence it is difficult to identify and address planning and issues associated with the amenity migration trend in a systematic and focused fashion.

Conversely, the characteristics of semi-permanent migrants are more systematically addressed. For instance, McWatters (2009) identifies residential tourists using criteria from Rodriguez (2001) in his definitional framework.

Rodriguez categorized RTs according to four main criteria:

They [residential tourists] constitute a *concrete human group* (retirees; the elderly); they exhibit *different patterns of mobile behaviour* (permanent migration, temporary migration); they demonstrate a *tourist motivation* with an individual basis (satisfaction in enjoying free time) and economic dimensions (in terms of consumption, real estate markets and services); and they create *territorial effects* (53).

Rodriguez's criteria not only provide a useful framework for understanding RTs, but also illustrate many similarities between amenity migration and residential tourism. By creating a more fluid definition of permanance, both amenity migration and RT are shown to share similar levels of semi-permanance – a classification more attune to today's trend toward increased mobility (Sheller and Urry, 2006). However, as McWatters (2009) argues, a number of criteria require further refinement.

While axiomatic that older generations more often than younger generations have the monetary means and freedom from work to become RTs, there are continually lessened constraints placed on young people becoming RTs. Increased mobility facilitated by broadband technology and a reduced need for a

physical presence in the workplace has created opportunities for young skilled professionals to live and work in different locales. As Sheller and Urry (2006) argue, increases in human mobility are facilitated by extensive systems of immobility (e.g. broadband infrastructure, freeways, airports, etc), which create a deterritorialization effect and allow more people of working age to become footloose workers, affording them the opportunity to become RTs if they so wish. Although an age profile of the South Okanagan displays a large portion of elderly when compared to the provincial average, its relative propinquity to the west coast of BC allows for a great deal of RTs of working age.

Second, McWatters (2009) argues that RTs *must* exhibit *only* those patterns of mobile behaviour that allow for semi-permanent or permanent migration. Indeed, without at least semi-permanent migration, what criteria would be available to differentiate RTs from tourists? And, without a classification indicating at least some degree of semi-permanence, what criteria would be available to differentiate RTs from any other residents? If Sheller and Urry (2006) are correct in arguing that human populations are becoming increasingly mobile, arguing that RTs exhibit only *different* patterns of mobile behaviour implies that RTs are less mobile than the average population, when in fact the opposite is true (Nelson, 2006).

McWatters' (2009) argument for the semi-permanent migration patterns of RTs holds true for the South Okanagan. Several key informants indicated that many properties had been purchased with the owners intending to become RTs only at a later date. In the meantime, these owners exhibited patterns of semi-permanent migration only in the form of extended seasonal stays or visits more

closely aligned with durations that would be expected of short-stay tourists. In the interim these properties were simply treated as investments.

Third, Rodriguez argues that RTs exhibit a tourists' motivation. However, while the majority of RTs may be consumption-oriented, a great deal may also be productive members of society. Richard Florida (2002), for example, argues that the lifestyles associated with various cities play a large role in their ability to attract companies and employees. While focused on urban areas, Florida's argument demonstrates that RTs and economic migrants can potentially be one in the same, and that migration is often a multi-faceted decision. As Chipeniuk (2004) argues of amenity migrants, even those focused on consumptive lifestyles often bring with them knowledge and skills that can make valuable contributions to the community. While this realization initially appears to be solely positive, economic ventures focused on lifestyle choices in the South Okanagan have manifested themselves in an unprecedented spread of vineyards, reducing the diversity of agriculture throughout the area.

Fourth, Rodriguez argues that RTs create territorial effects. There is little doubt that RT has a transformative effect on the landscape. The most obvious effects are a proliferation of vacation homes. However, territorial effects can extend to the consumption of rural landscapes and the expansion of urban areas. Such processes can transcend localized territorial impacts, altering the sense of place experienced by all within a community. In the South Okanagan the consumption of the rural landscape for RT-driven growth combined with rapidly expanding urban areas creates troublesome land use conflicts while altering the nature of the rural landscape

Beyond land use conflicts, social impacts of RT also create important and lasting changes. Costella (2006), for example, demonstrated several negative social effects occurring in popular destinations in Australia. A housing polarization developed, where young people were forced out as middle to upper class urban retirees moved to the seaside. Such effects are common in RT destinations, and can have profound influences on the future of destinations (Costella, 2006). For example, the gentrifying effects mentioned above often create a shifting age profile within the community, with young people moving out and retirees moving in. The results range from labour shortages to an overburdened health care system in ill-equipped, often rural destinations.

Finally, McWatters adds a fifth category to Rodriguez's criteria, arguing that RTs possess a distinct intention to create a lasting home out of their semi-permanent destination. McWatters's meaning is not that the RTs will permanently relocate to this destination, but rather that they will experience the time spent in their semi-permanent destination differently from a tourist. That is, RTs will form a deeper connection with the place as they intend to recreate a sense of home there, albeit a semi-permanent one. Not only does McWatters' argument align itself with literature on place attachment (e.g. Stedman, 2006), it also highlights an important consideration for destination planners. While tourists are often indifferent to future destination development, residents and semi-permanent residents have been shown to have divergent views on development. Long time residents, as Costella (2006) demonstrated, are often in favor of development, as long as it is not seen as driven solely by, or focused solely towards, new residents. Semi-permanent residents, however, often express

a “last man in” attitude to development, fighting to prevent any further development and preserve their vacation destination. This form of semi-permanent resident NIMBYism (Not in my backyard) often appears in BC’s resort communities. For example, Welk and Gill (2007) found that second-home owners in Tofino, BC were opposed to further development that might threaten their piece of paradise.

Although most studies of RT involve international mobility (e.g. McWatters, 2009; Casado-Diaz 1999), nothing precludes RTs from assuming *intranational* flows. And, similar problems associated with international mobility – foreignness and class conflict, for example – have been demonstrated in Canadian studies. Jaakson’s 1984 Canadian study identified a ‘social distance’ between RTs (referred to by Jaakson as second-home owners) and permanent residents. RTs were shown to differ in class, status, values, and behaviour and were seen as ‘permanent tourists’ in a perpetual state of travel anticipation. Thus RTs may be seen as a minority group based not only on their attitudes and behaviour but also on their above-average income, education, and age.

The afore-mentioned issues present an interesting and unique problem for RT destinations. RTs may, on the surface, be indistinguishable from permanent residents. However, further investigation reveals discernable undercurrents of difference between RTs and locals. Regardless, deciphering the mindset of these RTs is beyond the scope of this report. Whether or not RTs considers themselves tourists or residents is not as important for tourism destinations as is understanding the link between tourism and RT.

As tourism-oriented locales often experience RT en masse, accepting the connection between tourism and RT is an important step that enables local decision-makers to mitigate negative impacts and maximize positive transformations. Section 2.2 further explores the connection between tourism and RT

2.2 Putting the Tourism in Residential Tourism

In an attempt to explain the plethora of factors influencing migration, scholars have generally focused on two main phenomena: labor-oriented and consumption-motivated movements of people (Buller & Hoggart, 1994; Williams & Hall, 2000). RT almost entirely falls into the latter category, yet consensus is lacking on its causes. In his work on amenity migration, for example, Moss (1994) identified a shift in how people perceived natural resources, arguing that instead of an extractive value, society was increasingly placing an intrinsic value on these resources. Rural areas, Moss argued, and the small-town, quiet lifestyles associated with them, focus on the conspicuous consumption of natural scenery – a factor that Williams and Hall (2000) argued directly influences migrants' destination choices. Consequently, locales endowed with great natural beauty have become increasingly desirable areas to pursue quality of life experiences, including residency.

However, despite Moss' arguments, others have placed less emphasis on shifting societal values and more emphasis on the role of tourism. Expanding on Moss' concept of natural environments as migration magnets, Williams and Hall (2000) recognized that tourism promotion strategies often revolved around the

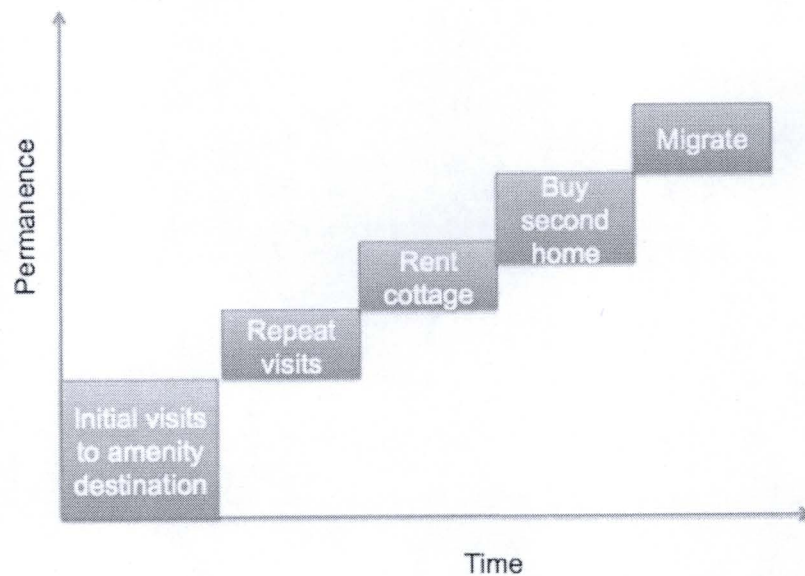
promotion of natural scenery, sharing the same consumption-oriented focus as described by Moss. McWatters (2009) furthered the connection between short-stay tourism and RT, arguing that all forms of consumption-oriented migration are closely associated with tourism. Tourism itself, McWatters (2009) continues, is a sub-type of consumption-oriented migration, albeit a much less permanent one.

Williams et al (2000) have proposed two strong arguments to further support the connection of short-stay tourism and forms of semi-permanent migration. The first argument concerns what they describe as the “definition of search spaces” (35). Williams et al (2000) argue that flows of permanent or semi-permanent migration arise out of pre-existing flows of short-term vacation tourists to that destination. The decision to move to an area is usually formulated during vacation, and possibly reinforced during subsequent visits. Consequently, short term consumption-oriented vacations often serve as a springboard for more permanent migrations – a conclusion that seems logical and also goes a long way to explain why later permanent migrations are often consumption-oriented.

Williams et al’s (2000) argument is well received in the literature on tourism and migration and is often complemented by other models illustrating the progression of short-stay tourist to permanent or semi-permanent migrant. For example, in 2002, Stewart proposed a model that builds off Williams et al’s (2000) theories and articulated the evolution from tourist to migrant (see: Figure 2). Instead of the simplified tourist-migrant transition Williams et al (2000) describe, Stewart proposed that residents may undergo a series of more permanent stays, never needing to fully transition to permanent resident status.

Stewart's improvement of Williams et al's (2000) first argument is important because it reinforces the point that amenity migrants often reside in amenity rich places along a spectrum ranging from short term to semi-permanent to permanent inhabitants, thus contributing to the elusive challenge of clearly articulating the phenomenon.

Figure 2 – From Tourist to Migrant

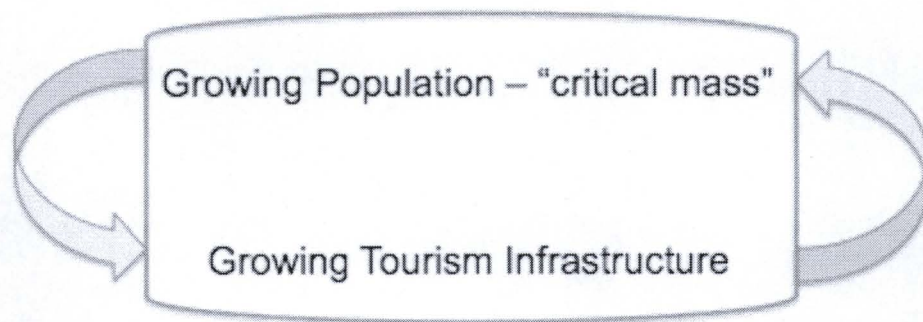


Adapted from: Stewart, 2002

The second geographical facet of Williams et al's (2000) argument concerns the provision of basic infrastructures used to facilitate in-migration. The crux of this argument is that short-term tourism visits create a critical mass in population, which allows for the development of consumption-oriented amenities and services. These newly developed amenities make the destination more appealing, which then facilitates a greater number of more permanent consumptive visits, and in turn, increases migration.

Williams et al's (2000) second argument is important because it goes beyond identifying the consumptive focus of migrants (the demand side) and attempts to articulate the development of the destination (the supply side). In attempting to understand the development of the destination, Butler's (1980) model for resort destination development is particularly relevant, and fits well with Williams et al's (2000) arguments. Butler argued that tourism areas undergo a life cycle from discovery, development, stagnation, and then either decline or rejuvenation. For RT destinations, Williams et al (2000) have outlined the process that drives Butler's model. Tourism and more permanent forms of consumption oriented migration drive the development of a tourist destination's amenities, which in turn create more consumption oriented migration (see: Figure 3). The resulting feedback loop forms the basis of a tourism-focused community's economy and drives the destination along Butler's life-cycle model until limits are attained and the destination falls into decline or enters a phase of reinvention and rejuvenation. If and when a tourist destination's decline occurs depends largely on how management of the destination resources are consumed.

Figure 3: Tourism, Population, and Destination Development



(Adapted from: Williams et al, 2000)

The initial growth model proposed by Williams et al (2000) fails to consider the impact on the surrounding landscape. In rural areas, one of the major inputs into the afore-mentioned model is land. For rural tourism areas, agriculture and other values associated with the countryside are mainstays of the tourism economy. If the above model is taken as correct, then continuous consumption of agricultural land for amenity and service development is necessary. However, for agri-tourism locales, conservation of the natural resources and landscapes are part of the product development function itself, and the tourism experience cannot be separated from the preservation of the environment (Poitras and Getz, 2006).

In the South Okanagan, the success of the tourism industry is at least partially due to the preservation of rural and agricultural land. The scenic beauty of the area is a direct result of the agricultural practices that make the area appear green, lush and inviting. Without the presence of agriculture, the natural vegetation is that of a semi-arid desert, hardly an amenity-seeker's paradise. Research conducted by Dumais (2002) confirmed agricultural aspects are top priorities as attractions for visitors to the area. And, evidence from conversations with key informants revealed that agriculture plays an important role in creating the illusion of the rural idyll – the scenic, pastoral environment highly sought-after by tourists and consumed by RTs. The direct consumption of this landscape threatens the scenic beauty of the area, the tourism industry, and agricultural operations. Beyond the impacts of direct consumption of land, the interface of RTs seeking the rural idyll and those who draw their livelihood from agricultural practices creates several problems that indirectly alter the landscape. Section 2.3

explores the appeal of the rural idyll and presents theoretical reasonings as to why conflicts occur between agriculturalists and RTs in these areas.

2.3 Appeal of the Rural Idyll

The romanticized notion of rural environments is heavily influenced by increased urbanization. Although the rural-urban dichotomy may not be accepted as an empirical definition, as a heuristic amongst the general urban populace the rural-urban dichotomy influenced the rural renaissance of the 1970s and is again playing a role in the increase of semi-permanent and permanent migration in western society. The symbolic value of the rural as an antipode to urban living is promoted by many communities either in their vision statements, on the front page of their website, or by their destination management organization. These efforts embrace the notion of a 'rural idyll' by focusing on "an idealized lifestyle emphasizing small-scale built landscapes, community, unhurried quietness and localism" in order to attract tourists and residents. (McWatters, 2009, pp.39).

Andrews (1999) argues that: "as we become more urbanized and mechanized, the greater our appetite for landscapes without human presence, or signs of human presence - unless, that is, the human presence is organically sympathetic to landscape, such as shepherds, cottages, or cornfields" (p.39) The rural idyll thus becomes a consumptive notion imbued with moral and social values that are highly desirable; small town life complete with friendly neighbors amidst a pristine landscape. This concept, however, rests upon the notion of the rural as an aesthetic, non-productive landscape - a preconceived mental template that is very different from the reality of rural areas as a place of production.

Essentially, the 'landscape' of the rural sought by visitors and semi-permanent residents differs greatly from the 'place' that is the rural as experienced by residents. At a conceptual level, exploring the differences between 'landscape' and 'place' underscores the idea that landscape functions as a mask that, when combined with preconceived notions of pristine rural environments, creates the myth that is the rural idyll.

McWatters (2009) argues that landscape consists of what the viewer selects from the land, then edits and modifies in accordance with his/her own views. Values ascribed to landscape are therefore influenced by the viewer's existing set of cultural values. For rural landscapes, visitors are typically outsiders seeking the idyllic scenery created by romanticized notions of the rural. Their concept of what constitutes an idyllic rural landscape is not only a social construction, but is heavily influenced by visual, aesthetic aspects. And, as McWatters (2009) argues, the very idea of landscape implies separation and observation from the outside. Thus, those seeking the rural idyll are pursuing a landscape disconnected with the reality of what constitutes a rural place.

Place, as McWatters (2009) suggests, differs from landscape in several ways. First, place can only be experienced as an insider since place acquires definition and meaning through past traditions and experiences, often built over generations. One cannot know a place intimately from an outsider's perspective. Relph (1979) suggested that to have a 'sense of place' meant to be experientially on the inside. This unselfconscious 'sense of place', as Relph (1979) suggests, evokes similarities in inhabitants' attitudes towards place, and implies a profound degree of investment in and care for a particular place. Relph claims

this sense of place stems from 'existential insideness', and looks to pre-industrial, agricultural society to locate examples. "Opportunities for people living in technologically advanced communities to cultivate and retain meaningful sense of place have been significantly compromised," Relph claims, "due to new and accelerating patterns of mobility, and a general deterioration of the significance of place." (p.48)

The second way in which place differs from landscape is through the notion of home. The experience of place is often associated with the idea of 'home', which is the foundation of our identity as individuals and as members of a community (McWatters, 2009). A sense of place could be derived from one's home as home used to imply stability, permanence, and a fixed place of reference. In today's society, however, enhanced corporeal mobility means that home implies only the location of your house, and that can be many places, or change every few years.

Understanding the difference between landscape and place is important as these concepts imply a diverse array of meaning for the rural environment. These differences underscore the contrast between outsiders and insiders and how the rural is perceived: Outsiders focus on landscape and are unable to truly sense place, while insiders have an unselfconscious experience of place. And, although landscape can be sensed from within place, the aesthetics are subservient to the everyday functioning of that place. This concept is often overlooked in rural tourism environments, where landscapes are promoted for consumption (i.e. visual consumption), and everyday functional activities (e.g. farming operations) arise as a source of contention amongst insiders and outsiders.

Herein lies the root of the problem encountered when RTs seek their piece of the rural idyll. The functional 'place' from which the agriculturalist draws his/her livelihood jars with the imagined 'landscape' sought by RTs. The South Okanagan, despite increases in tourism and RT, remains an incredibly productive agricultural area. As towns expand their boundaries and developers seek less expensive land in rural areas, urban-rural interface issues abound and it becomes clear that direct conversions of land from rural/agricultural to urban are not the only threats to agriculture and the rural idyll. Ironically it is the RTs seeking this rural idyll that are playing a growing role in pressuring for developments that threaten to destroy it. By seeking only the aesthetic 'landscape' and ignoring the true nature of 'place', RTs are shifting the role of the rural environment in the South Okanagan from one of production to one of conspicuous consumption.

An amenity property boom is underway in many developed countries. It involves primary and /or secondary residences being purchased in rural areas "...for their aesthetic, recreational, and other consumption-orientated use values" (McCarthy 2008, p.130). Increases in mobility, rapid growth in the relative incomes of urban professionals, loosening restrictions on foreign property ownership, and continual reductions in friction of distance through enhanced transportation and communication networks have opened prized rural environments to global markets (McCarthy, 2008).

The reification of nature and real or imagined values associated with rural landscapes has a defining influence on migrants' destination choices. In a growing number of regions, an increasing desire to live near natural amenities

has led to increasing scarcity of property and commodification of the surrounding environment (Moss, 2006). As a result, RT is driving unsustainable land use through rapidly urbanizing rural areas. Moss (2003) offered a poignant observation on the forces of semi-permanent and permanent migrants in rural, amenity-rich areas that succinctly sums up the transformations occurring throughout rural British Columbia:

An irony of increased environmental awareness in a free-market society is the commodification of the environment, so that demand for a piece of the action is chopping it up into one-to-five-acre fenced lots (pp. 22)

A number of examples discussed in Chapter 4 demonstrate how this phenomenon is occurring throughout the South Okanagan. Rural areas outside of town boundaries face significant pressures to accommodate development that is both uncharacteristic to the area and ecologically unsustainable.

2.4 Planning for Residential Tourism

If the preceding trend identified by Moss (2003) is correct, it is logical to assume that RT would be a priority for planners in high amenity locales. However, a survey of amenity places in BC suggests otherwise. Chipeniuk (2004), for example, surveyed 17 communities throughout BC in an attempt to assess planners' awareness of amenity migration, and their planning responses to it. He found that planners had little to no awareness of the phenomenon itself or its effects. Without awareness, planning for RT (or related phenomena) is impossible. Although several communities (e.g. Whistler, Okanagan-Similkameen) do plan for such phenomena in a peripheral sense, Chipeniuk

argued much of these planning processes appeared “suspiciously post-hoc or coincidental” (332).

While communities may be capable of implementing Official Community Plan development processes that incorporate critical dimensions of semi-permanent or permanent migrations and their effects, most have not embarked on such processes for several reasons. The first reason is a lack of the financial and human resources necessary for the task (Chipeniuk, 2004). Chipeniuk (2004) found that most small municipalities would require an increase in tax revenue in order to sufficiently conduct such planning. Similarly, rural areas often lack the trained planners, bureaucrats and /or politicians needed to address the phenomenon. The second reason such planning is not carried out is that a need for this type of planning has not been identified by local planners (Chipeniuk, 2004). Beyond a lack of awareness, few research methodologies and studies have emerged to help inform local governments about alternative strategies for dealing with this challenge.

Ultimately, Chipeniuk (2004) argues that regional or provincial governments should shoulder the responsibility of planning for consumption-oriented migration. He suggests that they may have the internal capacity to plan in a more holistic nature. This approach may be more effective than if one community plans in isolation of its neighbors – whom may also be impacted by the planning process. Unfortunately, some systemic rural distrust of the planning process combined with a lack of resources at the regional level may render any calls for planning for RT at the regional level moot (Chipeniuk, 2004). Provincial governments may be better suited to plan for RT. The provincial government

does provide legislation for communities to plan for RT indirectly. For example, the Agricultural Land Reserve (ALR) provides strong protection for farmland and largely discourages incursions from RT-driven sprawl in the South Okanagan and throughout the province. The ALR represents one of the first comprehensive land use plans within BC. Implemented by the New Democratic Party, the ALR was established through the Land Commission Act of 1973 largely as a response to the post World War 2 boom that saw the disappearance of vast expanses of farmland in BC's lower mainland. Since 1973 the size of the ALR has remained largely unchanged, although countless individual parcels have been added and/or removed. It remains a valuable landuse planning tool, especially in rapidly urbanizing rural areas.

Other Provincial legislation such as The Resort Associations Act gives certain tourism-oriented communities enhanced controls to regulate the form and character of developments within their community. Even the ability to implement zoning areas and development permit areas via Official Community Plans can effectively reduce the impacts of RT and amenity-driven growth. However, the effectiveness of these measures depends on individual communities and regions first identifying the effects of RT and then successfully determining when and where mitigative measures should be implemented. Understanding these pressures and then utilizing legislation to develop strategies to mitigate these pressures is critical to ensuring that unnecessary alterations to the nature of the landscape in agricultural communities do not happen. Unfortunately, inherent inconsistencies and drawbacks associated with Provincial legislation and regional planning efforts are often cited as preventing intelligent growth

management. No studies of RT (or related phenomena) to date have addressed these inconsistencies.

Determining the effectiveness of current land use strategies as they relate to the management of RT is a difficult matter for several reasons. First, no communities within BC have strategies dealing directly with RT, although several address the issue indirectly through various growth management strategies. Second, differentiating between growth caused by RT and growth from other causes is nearly impossible at an aggregate level. However, in communities experiencing a high level of RT, there is little point in making this distinction. Consequently, these communities should focus on creating the best growth management strategies using tools currently available. Understanding the various processes inhibiting intelligent growth management solutions is critical to the successful development of these strategies.

CHAPTER 3: METHODS OF INQUIRY

3.1 Introduction

The overarching goals of this study were to understand the role the rural landscape plays in attracting RTs, explore the impact these migrants have had on the rural landscape of the South Okanagan, and to discover strategies for communities to effectively manage this phenomenon. To achieve these goals, a case study of British Columbia's South Okanagan region was undertaken. The case study utilized qualitative survey methods to collect relevant data. Qualitative data was supplemented by a simple GIS analysis and an analysis of property tax data.

3.2 Primary and Secondary Research Questions

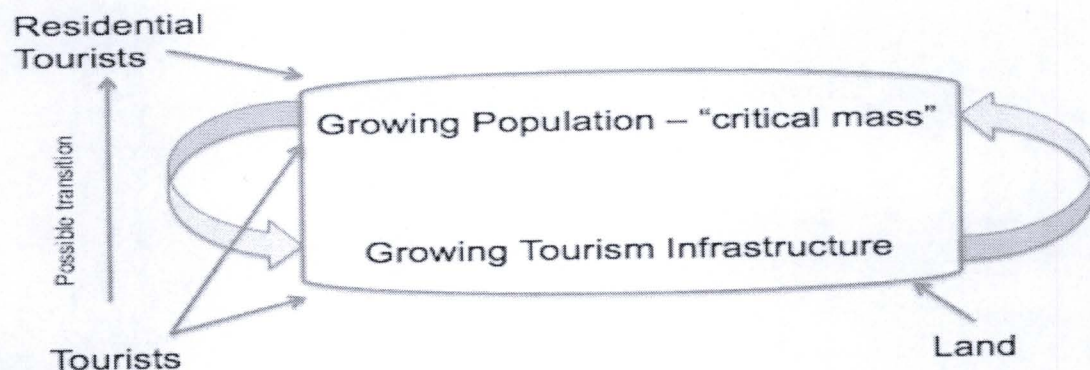
A set of primary and secondary research questions were formulated to address the research goals and focus the investigation. They are as follows:

1. What role does the rural landscape play in attracting RTs and tourists?
2. How has RT impacted the agricultural and rural landscape in the South Okanagan
3. Are the pressures of RT adequately addressed with existing policy (e.g. ALR, rural zoning, growth strategies, etc)? Are new policies and/or methods required to address these pressures?

3.3 An Assessment Framework

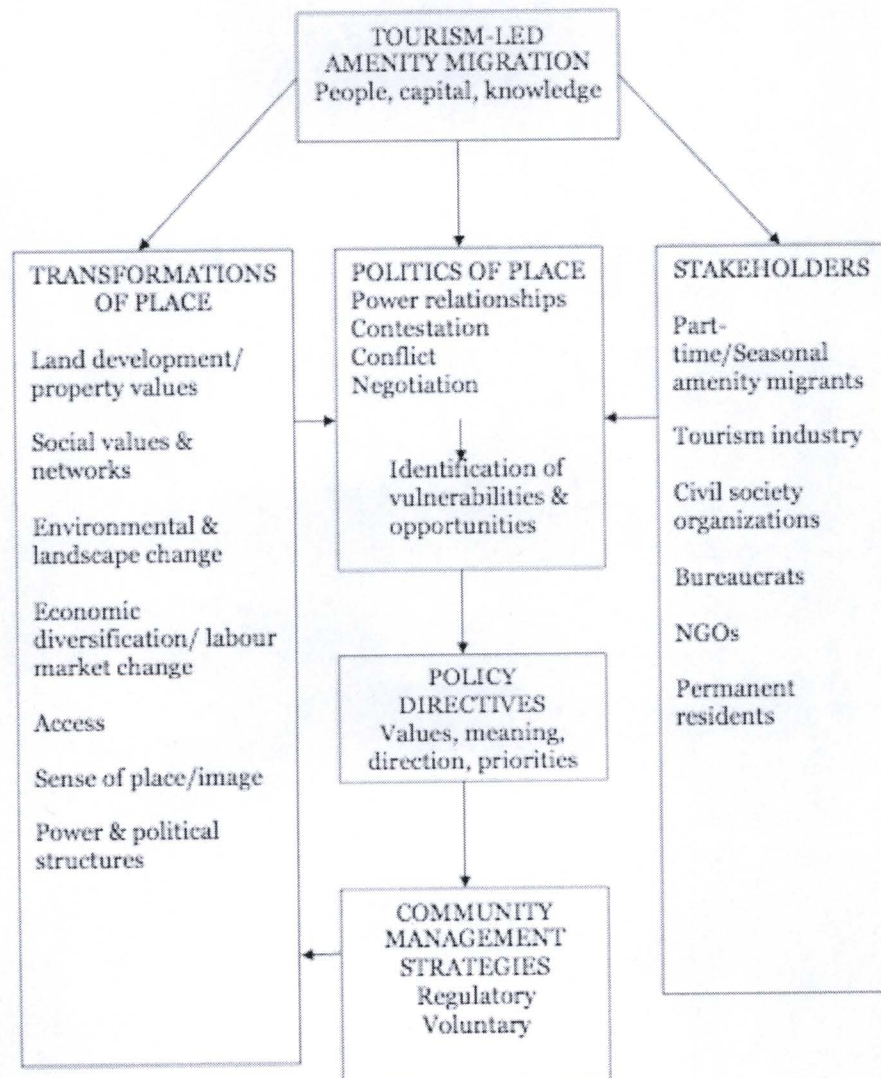
Figure 3 (see: Chapter 2) provides the research framework from which initial lines of inquiry were drawn. The concept, initially presented by Williams et al. (2000), has been modified slightly to include the role of the natural landscape. This modified concept is demonstrated in Figure 4. It hypothesizes that a reinforcing feedback loop is generated between the built infrastructure of a destination and the critical mass of people needed to support the destination's development. Figure 4 also suggests that the surrounding rural landscape plays a critical role by supplying the physical space necessary for growth. This aspect is not addressed in the Williams et al, 2000 model. In my model (Figure 4), the surrounding landscape assumes a dual function. It not only serves to attract RTs and tourists to area, but also provides land for the ensuing infrastructure and development that occurs. This development in turn leads to increased flows of tourists and RTs. In destinations like the South Okanagan, the rural landscape assumes exactly this role. Consequently, the region depends on a set of delicately balanced relationships between agriculture, tourism, and urban growth.

Figure 4 – Residential Tourism and Destination Development



The feedback loop created by Williams et al (2000) and modified for this research can be placed within a larger framework developed by Gill and Williams (2007) (see: Figure 5). The ‘transformations of place’ occurring in the South Okanagan relate to the feedback loop proposed by Williams et al (2000), but are also influenced by several actors not captured within a simple growth model.

Figure 5 – An Analysis Framework for Tourism-Led Amenity Migration



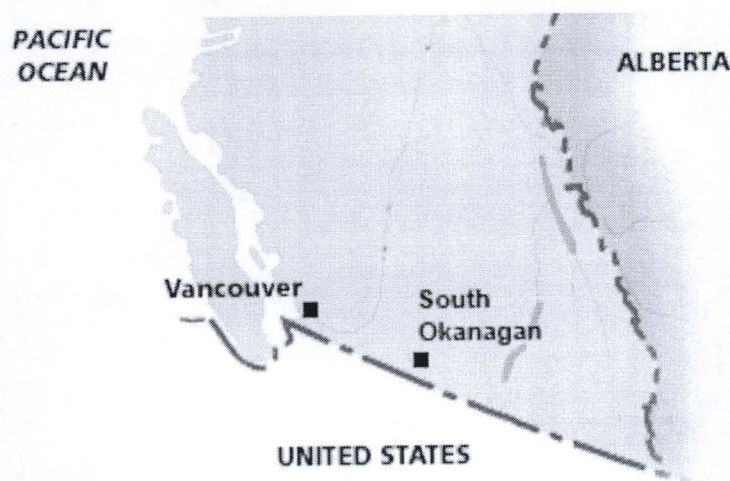
The Gill and Williams (2007) framework seeks to identify and shape critical discourses around the many tangled and independent aspects of tourism-led amenity migration, but is also useful when addressing other types of semi-permanent or permanent migrations, such as residential tourism. Stakeholders are readily identified and their role is filtered through various stages of power struggles (see, for example, Ness, 2009), policy directives, and community management strategies. One particular advantage of this framework is that it allows for varied routes of investigation into the effects of semi-permanent or permanent migrations. For example, Ness (2009) focused on power structures and contestation in the role of amenity-led land development. This report focuses on the transformation of place, specifically with respect to land development and sense of place. While the natural appeal of the case study area (e.g. picturesque rural environments) is partly responsible for these changes, the role of government and civil society organizations in shaping community management responses to emerging RT pressures are also relevant.

3.4 Case Study Selection

British Columbia's South Okanagan region was chosen as a case study. The primary focus of the case study was the southern portion of the Okanagan-Similkameen Regional District. It runs south of the City of Penticton and includes the towns of Oliver and Osoyoos, the surrounding rural districts, and the unincorporated area of Okanagan Falls. This area is typically referred to as the South Okanagan and is contained within the greater regional governance area known as the Okanagan-Similkameen (see: Figure 6).

This area was selected for several reasons. First, it is primarily agricultural in terms of land use. Second, recent shifts in agricultural practices to growing grapes for wineries appear to have caused an increase in tourism and related RT. RTs themselves appear to be reinforcing these land use shifts by purchasing agricultural properties and converting the land to vineyards. Finally, over the past decade the Town of Osoyoos has experienced dramatic developments aimed at attracting RTs. While nearby Oliver has not experienced such developments, a variety of actions on the part of the Town of Oliver have focused on attracting some of the type of development seen to the south in Osoyoos. Because of the significant levels of amenity-driven development occurring in Osoyoos, a significant portion of this study focuses on that area. Due to the regional governance structure of the Okanagan-Similkameen, several key informants residing inside and outside of Osoyoos provided valuable and relevant input for this study's findings.

Figure 6 - Case Study Area



The regional governance structure in the Okanagan-Similkameen (and therefore South Okanagan) provides a useful additional line of inquiry with respect to managing RT and amenity-driven development. Towns in the Okanagan-Similkameen region are governed by a mayor and council while adjacent electoral areas are governed through a regional board and represented by a rural director. With very different governance structures in immediately adjacent areas, it is not unusual for differing attitudes and/or perspectives towards development to arise.

3.5 Data Collection

Primary data collection took place in June and July 2009. These data were collected through a series of semi-structured, in-person interviews with informed stakeholders in the Okanagan-Similkameen region. Secondary data were collected through a variety of publicly-available sources including census data, websites, newspapers, local government documents and minutes, and informal conversations with long-time residents, tourists, and self-identified RTs. In addition, tax assessment information for the Okanagan-Similkameen region was purchased and analyzed to discover the extent of second-home ownership throughout the region. Second-home ownership, while not indicative of the entirety of RT development, was used as a proxy to measure its extent within the case study area. Chapter 2 presented the argument that RTs are primarily second-home owners. While it is true that many primary residents in the study area only reside in Canada long enough to keep their health insurance coverage, these people typically consider the South Okanagan their primary home (Key

informant #10). Based on the criteria defining RT (see: Chapter 2), this research assumes that the census of second-homes provides a reasonable proxy for measuring the level of RT presence in the region, and henceforth refers to these properties as RT residences.

3.5.1 Interview Strategy

Interviews were administered using a semi-structured technique. Respondents were asked a series of open-ended questions relevant to the topic of RT in their region. They were asked to elaborate on related topics of interest. The interview guide and the topics addressed are displayed in Appendix A

Most systematic research interview techniques depend on the application of an interview guide (Yow, 1994). Using these techniques, interviewers use preset questions to unearth the answers to specific questions. While an interview guide was developed for this report (see: Appendix A), care was taken not to interrupt the flow of unintended interview discussions that addressed issues not stipulated in the interview guide but relevant to the study's focus. When such discussions happened, the interviewer encouraged the free flow of information, and returned to interview guide questions if and when time allowed. In this sense, the interview strategy aligned itself with what Seidman (2006) calls an in-depth interview. Using this format, the questions asked typically followed from what the participant had said, stemming from initial questions asked by the researcher and found in the interview guide. This approach afforded the interviewer and respondent greater freedom in conversation – a factor that conferred the following advantages:

- Common issues highlighted by several participants were explored in greater depth
- Respondents took ownership of these topics more so than they would if the interviewer had prompted the discussion.

3.5.2 Interview Process

A total of 16 interviews were conducted at locations chosen by participants. Four interviews were conducted in public places (e.g. pub, coffee shop, visitor's center), ten in the respondent's place of work (e.g. winery, local government building, real estate sales office), and two in respondent's homes. Interviews lasted between thirty minutes and three hours, with the majority (11 of 16) exceeding one hour. While respondents were informed of the goals of the research prior to the interview, the purpose and objectives were re-iterated for their convenience. Participants were then asked to sign a research consent form and offered a copy of it for their records. Each interview began with a brief discussion of terminology. While a number of participants comfortably used the terms "residential tourism" or "amenity migration," others preferred to speak in terms of semi-permanent or permanent migrants and often juxtaposed these categories with a short-stay tourist category. All terminology was deemed acceptable by this researcher as it could be easily interpreted at a later date. Providing participants with an explanation of all terms used in the survey also helped to alleviate any pre-existent or emerging confusions associated with the interview process.

All interviews were digitally recorded and later transcribed. Respondents were given the opportunity to review the transcription in order to add comments

or retract statements. No respondents requested transcripts, retracted statements, or added comments after the interview was completed.

3.5.3 Selection and Recruitment of Interview Participants

In an attempt to recruit respondents with knowledge of land use issues, local government officials in the South Okanagan were targeted as initial key informants. These respondents were first identified through government websites and documents related to land use planning and tourism development published by local and regional governments. Potential respondents were first contacted via e-mails that requested their participation in the study (See: Appendix B). Follow-up emails and/or phone calls were placed in order to arrange a specific time and date for the interviews. Additional respondents were identified using a 'snowball method'. In these cases, new respondents were those deemed to have additional relevant knowledge as suggested by the initial round of interviewees. Due to the nature of the regional governance model in the Okanagan-Similkameen, three respondents did not have direct daily involvement with planning processes in the South Okanagan. However, their input is considered relevant as they are voting members of the regional board and therefore responsible for a variety of land use decisions throughout the South Okanagan and Okanagan-Similkameen.

Table 2 Distribution of Interview Respondents by Professional Occupation:

Position	# of respondents
Regional Planners	2
Local government planners	2
Local council members	3
Mayors	2
Other Elected Officials	6

Real estate agents	1
--------------------	---

Table 3 – Respondent Involvement In South Okanagan

Type of Organization	# of respondents
Direct involvement as politician or planner	10
Direct involvement as regional planner	2
Direct involvement through business	1
Indirectly involved through regional board	3

Due to the nature of the small-town political offices in the South Okanagan, several respondents' elected positions were held on a part-time basis. Consequently, their interest in this research often stemmed from their dual role as an elected official and a long-time farmer, resident, and/or business owner. Several respondents were directly involved in the tourism business as either winery owner/operators or farmers reliant on sales to tourists. Respondents also held positions (past and/or present) on boards such as the BC Agriculture Council, the BC Fruit Growers Association, the Similkameen Valley Planning Society, and various destination management organizations.

3.6 Primary Data Analysis

3.6.1 Property Tax Assessment

Property tax assessment data for the entire Okanagan-Similkameen was purchased through Landcor². This data file contains nearly 80,000 entries. Data were first separated by geographical area and then sorted to provide an estimate of RT residences within the South Okanagan.

² <http://www.landcor.com/>

Tax assessment data included the address of the physical residences in the South Okanagan and the owner's address. In many cases, the address of the physical residence differed from the owner's address. When these two addresses differed, the owner of the property had thus indicated his/her property in the South Okanagan was not his/her primary residence. For example, in the third line of Table 4 the address 17409, 87 St. is in the South Okanagan. However, the corresponding owner address is 35376 Eagle Mountain Dr., Abbotsford, BC. Consequently, the South Okanagan property is assumed to be an RT residence.

Table 4 – Property Tax Assessment Data

Type	Property Address		Owner Address		
2 ACRES OR MORE (VACANT)	141	FALCON PL	18690 63A AVE	SURREY BC	
SINGLE FAMILY DWELLING	17409	87 ST	35376 EAGLE MOUNTAIN DR	ABBOTSFORD BC	
SINGLE FAMILY DWELLING	8709	26 AVE	8709 26 AVE	RR 1	OSOYOOS BC
2 ACRES OR MORE (SINGLE FAMILY C)	19639	KRUGER MOUNTAIN RD	19639 KRUGER MOUNTAIN RD	OSOYOOS BC	
2 ACRES OR MORE (SINGLE FAMILY C)	21007	ALKALI RD	21007 ALKALI RD	OSOYOOS BC	
SINGLE FAMILY DWELLING	3026	33 ST	3026 33 ST	RR 6	OSOYOOS BC
SINGLE FAMILY DWELLING	807	41 ST	807 41 ST	RR 6	OSOYOOS BC
SINGLE FAMILY DWELLING	16243	INKANEED RD	963 MELBOURNE AVE	NORTH VANCOUVER BC	
RESIDENTIAL LESS THAN 2 ACRES (V)	17227	87 ST	17223 87TH ST	RR 2	OSOYOOS BC
SINGLE FAMILY DWELLING	12488	87 ST	12488 87 ST	OSOYOOS BC	
2 ACRES OR MORE (VACANT)	500	RAVEN HILL RD	1101-1200 6 ST SW	CALGARY AB	

Although property tax assessment data *does* include a categorization of the type of dwelling – a category that includes “seasonal dwelling” or “vacation home” – this categorization is not useful in determining RT residences throughout the area. Providing the option of describing a property as a “vacation home” or “seasonal dwelling” does not preclude other properties from being used for the same purpose. For instance, several respondents concluded that many single family homes and other properties were used as seasonal residences and that seasonal occupation was not limited to properties identified as seasonal dwellings or vacation homes. As the property owners themselves choose to differentiate between their primary address and their property in the South

Okanagan, use of property tax assessment data is considered a useful proxy in identifying RTs.

3.6.2 GIS Analysis

To map the distribution of RTs throughout the area, data indicating the presence of an RT residence (as described in section 3.6.1) was reformatted according to the following format and placed in an Excel file:

Table 5 – Formatting for Geocoding Process

Address
<i>Number, street</i>
<i>Number, street</i>
<i>Etc...</i>

Data was then exported as a comma-separated-value (csv) file and geocoded through ArcGIS using street network data for BC from DMTI Spatial. Unfortunately, a small number of addresses (approximately 10%) were not recognized by this software and were not automatically geocoded. The majority of these addresses were in rural areas. To rectify this problem, non-geocoded properties were manually identified in ArcGIS after being located using Google Earth.

Once the geocoding process was complete, data was cross referenced with ALR spatial data available through GeoBC. This process allowed for the identification of RTs within the ALR.

The purpose of the GIS analysis was to demonstrate that numerous properties occupied by residential tourists exist within the ALR. Because the analysis located properties using a geocoding technique and did not employ

cadastral mapping data, the physical area occupied by residential tourists could not be calculated. The researcher acknowledges this limitation.

However, using the aforementioned techniques and software to display GIS information has several advantages. Most of these advantages relate to cost-efficiency – a primary consideration for small towns with limited financial resources. These advantages are as follows:

- ArcGIS, Microsoft Excel, and Google Earth are standardized software available to most local and regional governments
- Local and regional governments already have access to property tax assessment files
- As Google Earth employs extensive photorealistic coverage, ground truthing and photographic analysis easily confirm the accuracy of the geocoding process.
- GeoBC provides a wealth of spatial data free of charge

3.7 Secondary Data Analysis

Secondary data were collected from January 2008 through July 2009, and were used to cross reference key informant responses and provide additional context during interviews. These data provided the interviewer with a greater awareness of local matters, which helped procure more meaningful outcomes from interviews

Secondary data were derived from publicly available documents, planning surveys completed by non-government organizations (e.g. the Similkameen Valley Planning Society), and online sources. In several cases, respondents recommended certain documents (e.g. an Official Community Plan, specific council minutes) relevant to this research. Local and regional government documents provided much useful information. These documents included council

minutes, planning reports and drafts, public workshops, and building statistics. Collectively, they addressed issues related to RT, amenity-driven growth, agricultural land use, and growth management. Online sources included local community blogs and newspapers.

3.8 Study Limitations

3.8.1 Qualitative Research Limitations

The primarily qualitative nature of data obtained through key informant interviews introduces a number of limitations that may affect the study's accuracy. In an effort to promote transparency, the overriding limitations and assumptions are:

- As key-informant interviews were a critical component of this research, the interviews themselves may limit the research. Information obtained from interviews is subject to both the interviewer's skill, and the interviewee's willingness to participate. To mitigate limitations arising from interviews, pre-testing of the interviews with colleagues affiliated with the Centre for Tourism Policy and Research was performed. Although testing with respondents from the South Okanagan would have been ideal, the time constraints of participants did not allow for such testing. Additionally, pre-testing with respondents would have to be conducted via telephone. As all interviews were conducted in person, pre-testing via telephone was deemed ineffective.
- As interviewees were not selected at random, the narratives expressed may not have fully captured the perspectives of all stake-holders and decision-makers in the case study area. Efforts were made by the researcher to select a broad distribution of informants in terms of profession and geographic location. Additionally, a number of informal conversations with long-time residents, tourists, and self-identified amenity migrants helped to safeguard against potentially narrow viewpoints expressed by key informants.
- A relatively small sample size (n=16) combined with the case-study format used means that results obtained are largely context-

specific. A 'snowball' sampling method helped to determine the number of respondents. Once responses became repetitive and respondents recommended informants that had already been interviewed for this research, the snowball process was curtailed.

- Respondents were questioned about the psychological appeal of the landscape as it related to residential tourists' decisions to purchase property in the South Okanagan. Few respondents were RTs themselves, and thus may not be capable of fully appreciating the mindset of RTs. Triangulation with past literature and secondary sources was utilized to mitigate this shortcoming.
- Qualitative interviewing techniques are typically associated with a degree of bias (Patton, 2002). Although attempts were made through interview techniques to limit the introduction of bias, completely eliminating all bias was impossible. Primary and secondary data provided a method of triangulating some of the qualitative interview findings.

3.8.2 Quantitative Research Limitations

- Cadastral mapping data for the South Okanagan was not available during the time of this study. Utilizing cadastral data instead of geocoded addresses could have provided a more thorough visualization of the impact of RT on the South Okanagan landscape.
- Due to confidentiality restrictions, full names of property owners were not included in the property tax assessment data used. Had these names been included, vacant lots owned by developers and/or development companies could have been more accurately identified.

CHAPTER 4: FINDINGS

4.1 Introduction

This chapter presents the findings of the key informant interviews and complements that information with context-specific secondary data in order to answer the primary research questions:

- What role does the rural/agricultural landscape play in attracting RTs?
- How have RTs impacted the rural/agricultural landscape?
- Are the pressures of RT adequately addressed with existing land use strategies? Are new strategies required?

The chapter begins by offering a brief profile of the key informants. Following this profile, section 4.3 explores the spread and penetration of RT within the South Okanagan. Section 4.4 investigates what motivates RTs to purchase property in the South Okanagan. Section 4.5 examines reasons why the growth in RT is problematic, and Section 4.6 examines pressures placed on the agricultural land reserve and on the rural/agricultural landscape as a result of RT. Finally, Section 4.7 offers a brief conclusion.

4.2 Key Informant Profiles

During the course of the key informant interviews, the 16 participants were asked questions regarding the duration of their residence in the case study area, and to what extent they were familiar with the term 'residential tourism' before being contacted to participate in this research. Responses to these questions helped to contextualize the respondent's familiarity with RT and related

phenomena as well as current and historical political/planning issues within the case study area. Only two of the respondents (13%) were RTs as defined by this research - semi-permanent residents that moved to the area principally from a tourists' motivation. The lack of RTs within the respondents suggests that the RT population of the South Okanagan is highly transient and not often involved in local planning or government related management processes.

Respondents were somewhat familiar with the term residential tourism, including some of its impacts. The majority of respondents (14) indicated they were 'somewhat familiar' with the phenomenon, while a few (2) indicated they were not familiar with the term. No respondents considered themselves to be an expert on RT or its effects. These levels of familiarity are consistent with the extent that Chipeniuk (2004) discovered amongst planners and politicians while investigating the related phenomenon of amenity migration in the Bulkley Valley.

4.3 The extent of Residential Tourism in the South Okanagan

With limited land available within the municipalities, a significant amount of growth in the South Okanagan is focused on rural areas. The area's regional Growth Strategy states:

Currently, the Regional District's municipalities have limited capacity to absorb additional growth based on current densities, land use mix and a finite land supply, whereas the rural areas have limited service to accommodate future growth in a *sustainable* manner (p.17) [emphasis added]

That the strategy states growth in rural areas cannot be accommodated in a *sustainable* manner does not mean it is not occurring. Given evidence from the region's tax assessment file, a great deal of development in rural areas appears to

be attributable to RT. For example, an analysis of the regional tax roll indicates that between 26% and 37% of properties within the rural areas are owned by residential tourists. Many of these residential properties occupy land within the ALR. For example, in rural Osoyoos approximately 75% of the residences occupied by residential tourists are within the ALR. Table 6 provides further relevant information.

Table 6: Analysis of Tax Assessment Roll – South Okanagan

Place	Distribution of RTs within the South Okanagan
Oliver (town)	12%
Oliver (rural)	16%
Osoyoos (town)	37%
Osoyoos (rural)	26%

Source: BC Property Tax Assessment– Okanagan-Similkameen. Custom Report.

Table 6 does not include vacant properties. When vacant properties are included in this analysis the numbers increase greatly. Importantly, a disproportionate number of vacant properties were registered to non-local owners. These vacant properties may be investment properties or future RT residences. Table 7 provides information:

Table 7: Analysis of Tax Assessment Roll including Vacant Properties

Place	Distribution of RTs and vacant properties within the South Okanagan
Oliver (town)	13.2%
Oliver (rural)	22.8%
Osoyoos (town)	38%
Osoyoos (rural)	44%

Source: BC Property Tax Assessment– Okanagan Similkameen. Custom Report.

The largest difference between Table 6 and Table 7 is found within properties in rural Osoyoos. The vast majority of vacant properties can be attributed to a development under construction east of the Town of Osoyoos

known as Regal Ridge. The development specifically targets potential RTs, advertising driving distances from most urban centers and marketing a “rural lifestyle away from urban pressures.”³ However, the development is essentially a sprawling suburb in a once rural area.

Two main problems exist in regulating rural development in the South Okanagan. First, the regional government, not local councils, oversee development in rural areas. With only limited staff members and a vast area (10,413.44 km²) under their jurisdiction, the regional government faces serious resource capacity constraints. Even the regions’ tentative growth strategy itself recognizes that “Urban development is attracted by the greater ease and lower land costs of expanding into farmland” (RDOS, 2009, pp.48). Because individual towns in the South Okanagan do not have direct control over their rural areas, development in these settings may not be complementary with town goals. Second, even if agricultural land is not converted directly into residential properties, when productive farmland is surrounded by residential properties, the pressure to sell and convert the land increases (Smart Growth BC, 2004). Additionally, with the encroachment of residential property on agricultural areas, conflicts over land use and farming practices become more commonplace (Campbell, 2006).

Figure 7 depicts RT distribution throughout the southernmost portion of the South Okanagan (including the Town of Osoyoos and rural Osoyoos – Electoral Area A). This map illustrates the prevalence of RT residences

³ The Regal Ridge vision can be viewed online at: http://www.regalridge.com/RegalRidgeAcreages_vision.htm

throughout the town and the rural areas of Osoyoos. Although many are clustered near the lake, RT residences are not limited to those with proximity to the lake. This finding questions the common perception that the lake provides the primary impetus for secondary/vacation-based homes in the area.

Figure 7 – Residential Tourists within Osoyoos and Electoral Area A

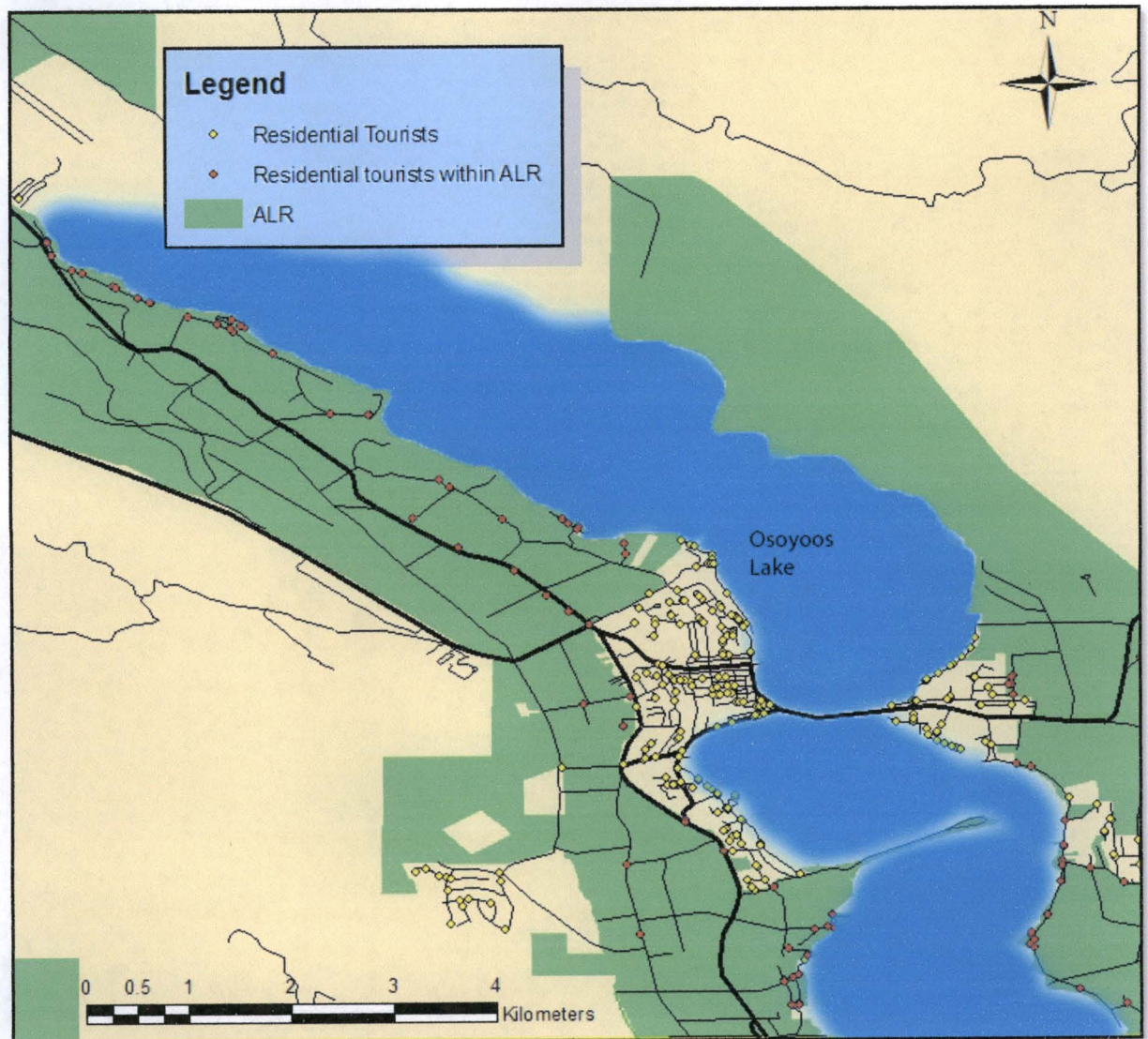


Figure 7 also depicts RT residences within the Agricultural Land Reserve. Approximately 75% of the RT residences outside the town boundaries of Osoyoos are within the ALR. Although owning a residence on an agricultural lot does not

preclude the land from being actively farmed, it does serve to illustrate the fact that a significant portion of properties within the ALR were not purchased for their productive potential. In the case of Osoyoos, approximately 20% of the total residences outside the town boundaries are RT residences within the ALR.

Researchers (e.g. Relph, 1979; Chipeniuk, 2004; McWatters, 2009) have often thought the rural landscapes may play a role in attracting permanent and/or semi-permanent migrants, including residential tourists. The following section discusses the appeal of the rural/agricultural landscapes in attracting RTs to the South Okanagan. Despite the prevalence of literature discussing the appeal of the rural idyll, the landscape was found to play a different role in the South Okanagan, with RTs possessing more nuanced motivations.

4.4 Rural amenity-seekers or savvy investors?

As an active agricultural area, any examination of the role of the rural landscape cannot ignore the contribution of agriculture to the quality of the landscape. The majority of respondents (12 out of 16) acknowledged that agriculture did contribute heavily to the scenic beauty of the area. One respondent, for example, stated:

If there wasn't that green belt of agriculture, I suspect the place [Osoyoos] would be no where near as attractive. You just need to look at some of the old photos that just show the lake and sagebrush running right down to the lake. It looks like a pretty forlorn place. It doesn't look very inviting. The way it is now with the agriculture around here it looks like a little oasis. A place that's attractive rather than 'oh my god...' (Key Informant #11)

Despite the attractiveness of the rural landscape in the South Okanagan, the responses of key informants did not match fully with the literature (e.g. Relph,

1979; Chipeniuk, 2004; McWatters, 2009; McCarthy, 2008; Costello, 2006) that argued that attractive scenery plays a dominant role in the (re)location decisions of semi-permanent or permanent migrants, including residential tourists. In the South Okanagan, the majority of respondents (9 out of 16) indicated the landscape did not play an important role in attracting RTs. Only a small portion (3 out of 16) felt the landscape played a large role.

When asked what attracted RTs to the area, the initial response of most key informants (15 out of 16) was “a favourable climate.” However, close examination of the region reveals that a number of towns within a short drive from the South Okanagan (e.g. Keremeos, Cawston, Kaledon) have very few residents, fewer tourists, and virtually no residential tourists. These towns do, however, share the same climate. When confronted with this discrepancy, informants shifted their responses – often citing individual differences within each area of the South Okanagan as draws for migrants and tourists (e.g. a wide main street, a large lake, small town atmosphere). The majority of the amenities mentioned by respondents were not linked to a rural or agricultural landscape. Many of their factors could (at least superficially) be created and/or re-created in different locales. That built amenities stereotypical of a rural/agricultural area play such a dominant role in RTs’ purchasing decisions underscores the differences between ‘landscape’ and ‘place’ presented by McWatters (2009) and reviewed in Chapter 2. RTs appear interested in the illusory ‘landscape’ of a small town, but, as section 4.6 discusses, are often at odds with the reality of the small town as an active agricultural ‘place’. Furthermore, these responses aligned closely with literature (e.g. Mazon, 2006) on international flows of RTs seeking a variety of

‘place preferences’ (see: Chapter 2) ranging from landscape to climate to built amenities.

Respondents considered the rural/agricultural landscape to play a much larger role for short-stay tourists. When asked what attracts *tourists* to the area, the majority of respondents (10 out of 16) cited the attractive rural/agricultural landscape. A survey conducted by Tourism BC in 2004 confirmed the importance of the rural/agricultural landscape for tourists. Visitors were asked “what positive images come to mind when you think of the Okanagan Valley as a vacation destination?” The two most frequently cited images were the beautiful landscape/scenery (68%) and the favourable climate (65%). (Tourism BC, 2004)

A recent (2008) survey by the Similkameen Valley Planning Society (SVPS) found that recent migrants to the Similkameen Valley (immediately west of the South Okanagan) identified landscape related values as important factors in their relocation decisions. Table 8 displays a selection of results.

Table 8 – SVPS – Reasons for Relocation

Rank Reason (based on no. of times mentioned as “very important”	% of Respondents
To enjoy clean air	67.6
To enjoy clean rivers and lakes	63.4
Because of the climate	61.6
For peace and quiet	59.3
Because of mountains and mountain views	48.1
To be in a safer place	40.3
To live in an area of diverse plants/wildlife	38

Although the SVPS survey identified these recent migrants as amenity migrants (permanent, seasonal, or intermittent migrants driven by quality of life pursuits) the data acquired remains closely related to RT issues in the South Okanagan. The survey format utilized by the SVPS is possibly a better method to capture the motivations of recent migrants, or even semi-permanent migrants such as RTs. For instance, in the SVPS survey respondents were asked to 'check all that applied' from a list of 29 options. This method not only presents a variety of predetermined options, it also allows the respondent to quickly identify several reasons for their property purchase. Using an interview methodology not only limits respondents to discussing one or two factors, it also fails to present respondents with an extensive list of predetermined answers. While the interview methodology may introduce less bias, it does not allow for an extensive variation within individual responses. Thus, a conclusive answer regarding what attracts RTs to the South Okanagan is difficult to obtain. However, given the data presented by the SVPS and the fact that respondents' answers corresponded with past literature on RTs' motivations, it is fair to conclude that RTs' motivations are complex and nuanced, extending beyond a mere attraction to landscape or climate. And, this degree of complexity should not be surprising. Kuentzel and Ramaswamy (2005), for example, argued:

...Buying a seasonal or permanent home in a tourism based rural community involves more than psychological appeal. One cannot uncouple the lifestyle decisions about seasonal home purchase or residential relocation from one's career decisions, workplace decisions, entrepreneurial instincts, business investment decisions, and lifestage responsibilities (p.423)

Tourists may choose to *visit* a location for its picturesque rural quality, but *migrating*, even semi-permanently, involves a much greater commitment and is consequently a much more complex decision – a nuance echoed by several respondents.

It (the rural/agricultural landscape) *does* [appeal to] the tourists. But I don't know that it does for a large group of people who move here as much as it does the climate. I am not sure it's (the rural/agricultural landscape) in their forefront. It's an appreciation they have not identified (Key informant #10)

Age may also play an important role in explaining the preferences of South Okanagan residential tourists. For example, the median age of the short-stay tourist in the South Okanagan was between 35 and 44 (Tourism BC, 2004), while the average age of the resident population (including a significant portion of residential tourists) is nearing 60 in most areas (BC Stats, 2009). As one respondent stated:

The retirees who move here have been there and done that - done their volunteer duty, raised their kids, and now they just want to be left alone to golf, snowbird in the winter, stay here in the summer. This town offers them easy access to things they want to do (Key Informant #10).

While a minority of respondents felt that the rural/agricultural landscape played a large part in attracting RTs to the area, several interviewees (4) mentioned a shift in preference amongst RTs towards certain types of agricultural landscapes, namely vineyards and wineries. For example, when asked to describe the role (if any) the agricultural landscape plays in attracting RTs, one respondent stated:

People would come for fruit, blossoms...Now it's gone to wine tourism which is more lucrative for wineries and has more spillover here. ...Now it's very cache to own a winery or part of a winery. A number of wineries have changed hands or been started up by new people. (Key Informant #13)

The appeal of owning a winery or vineyard is a very real draw for RTs in the South Okanagan. A significant portion of land has already been converted from orchards to vineyards. Table 9, for example, illustrates the rapid growth in vineyards over a short time period:

Table 9 – Vineyards in the South Okanagan

Place	2004		2008	
	No. Vineyards	Acres	# of Vineyards	Acres dedicated to vineyards
Oliver/Osoyoos	102	3061	138	3398.27
Okanagan Falls	27	380	32	549.61

Source: Ministry of Agricultural and Lands, 2008.

Respondents indicated that RTs have influenced this switch by purchasing homes on agricultural land and leasing the attached vineyard. This strategy allows the owner to not only receive an income from the leased vineyard, but also affords the property 'farm status', which decreases property taxes. Commenting on the role RTs play on the regions' vineyards, one respondent stated:

A number of wineries have changed hands or been started up by new people... buying an orchard, and turning it to grapes as the prices increase. It's very trendy now... There have definitely been new acres added. I say we lament it because, first of all, it's not food...Tourism and this kind of thing is very fickle. A good year everyone wants it, a bad year and no one wants it. (Key Informant #13)

For those purchasing vineyards, the appeal of owning a vineyard appears to be just as much a financial investment as it is a psychological attraction. Although the rural/agricultural landscape may only play a small contributing role in a RTs' motivation to purchase property in the South Okanagan, it remains important to the tourism industry. One respondent, for example, stated:

I've often suspected that the economic output of farming is nowhere near in importance for the region as it is to have the region *look* like an active farming region. You could throw all the fruit in the lake as long as the area still *looked* like an agricultural area [emphasis added] (Key Informant #12)

Maintaining the agricultural look and feel of the region plays an important role in attracting tourism dollars. In this sense, the conversion of orchards to vineyards is unlikely to have a negative impact on the local economy as it does not detract from the visual appeal. Fortunately, compared to other forms of more urban, residential tourist developments, the spread of vineyards appears as a relatively benign phenomenon.

In Osoyoos, for example, several campgrounds both inside the town and in the rural area surrounding the town have been sold to developers and replaced with condominiums. While the town received infrastructure improvements and tax revenue in return for such approvals (which some argue are not 'improvements' since the additional capacity added is then consumed by new residents), all politicians and the town's planner felt those occupying these developments did not contribute as much to the local economy as the short-stay tourists before them:

If we look at the shift from tourist from campsites - mom and pop and the kids and a cooler, and their milk only lasted a day in the

heat. So they came and they went through our grocery stores like machines buying perishable products. There is a big shift there where now tourists (e.g RTs) come up with a box of frozen goods and probably buy food products at Costco (Key Informant #16)

Beyond mere economic input, respondents often identified an intangible “vibrancy” created by an influx of short-stay tourists that made the South Okanagan “the place to be” (Key Informant #16). This desirability, directly fostered by a large influx in tourists, lead most informants (14 of 16) to view short-term tourism in a very favourable light:

Tourism has always been important to the area. If we didn’t have it, the place wouldn’t be as desirable as it is. There wouldn’t be the businesses here, they just wouldn’t be able to stay open. From my perspective, we need to keep growing tourism (Key Informant #11)

If the tourism industry maintains the vibrancy and desirability of the area, fostering growth in tourism may be crucial to the quality of life within the South Okanagan. As evidence from Tourism BC (2004) illustrates, a major draw for tourists is the attractive landscape. Williams and Dossa (2003) argue this landscape thus becomes critical to maintaining both revenues from the tourism industry and the vibrancy and desirability the industry contributes to the area.

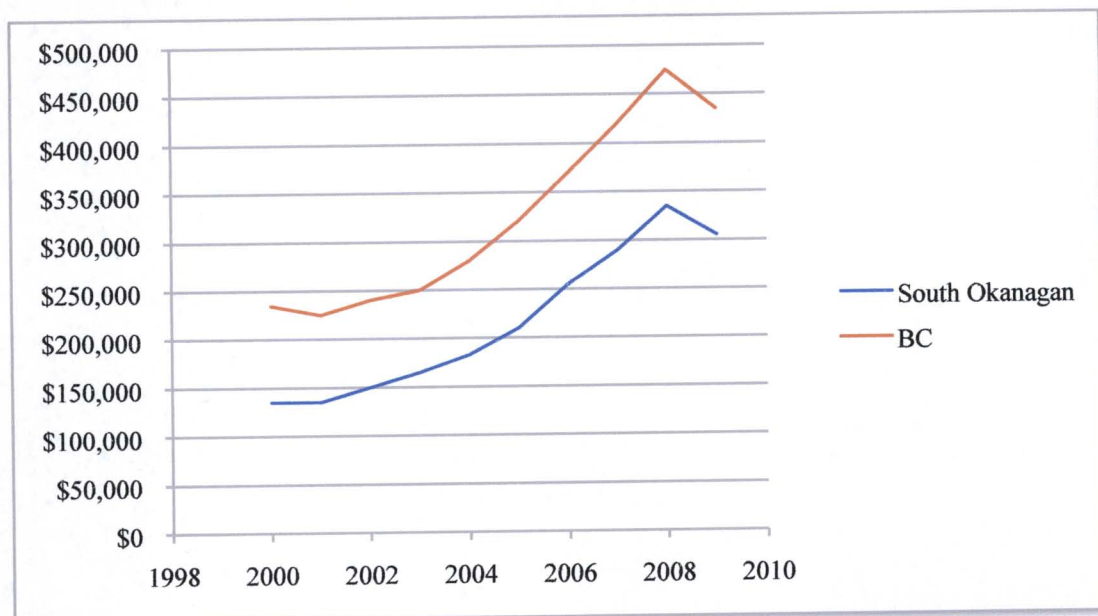
As an indirect product of a vibrant tourist destination, the South Okanagan real estate market offers an attractive investment opportunity. This opportunity plays a significant role in attracting RTs to purchase property in the area. One respondent felt that RTs were little more than short-stay tourists turned savvy investors.

Most people I’ve talked to say this is a place I’d like to live when I retire. So I’ll buy the house now and pay the mortgage and taxes

through renting and then have a 'free' retirement home (Key Informant #3).

Housing prices in the South Okanagan have undergone dramatic increases over the past decade. The Town of Osoyoos, for example, has seen house values increase by 250% between 2004 and 2008 (BC Stats, 2009). Figure 8 illustrates the increase in real estate throughout the South Okanagan and BC.

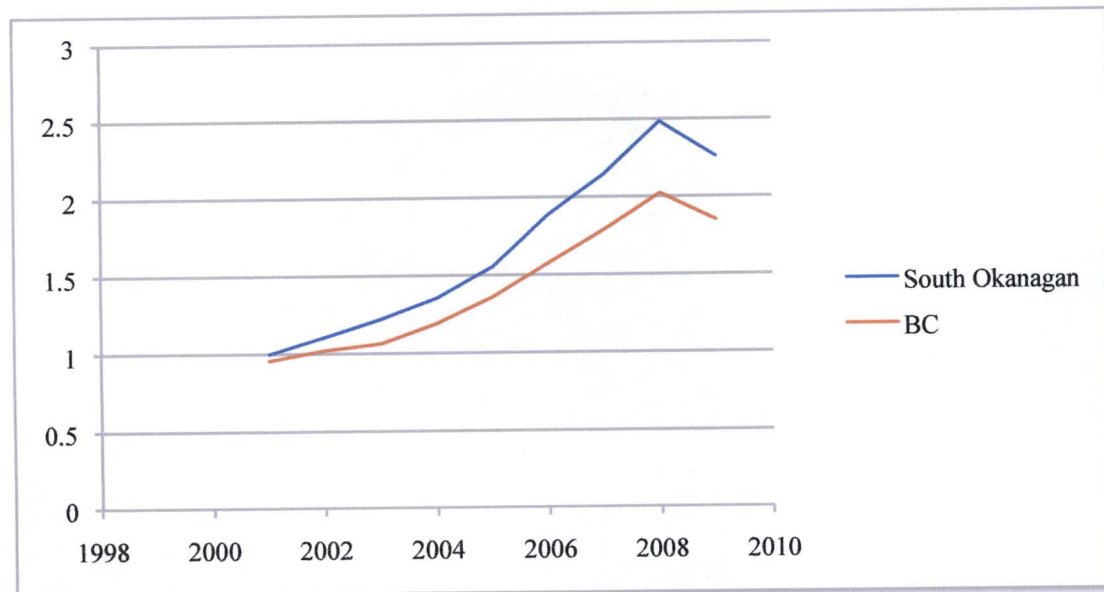
Figure 8 Average Residential Prices – South Okanagan



Source: South Okanagan Real Estate Board, 2009

Although actual real estate prices throughout the South Okanagan are lower than BC's average price, a closer examination reveals that prices in the South Okanagan have changed much faster. Figure 9 illustrates this change. A rapid change in price may reflect high demand and limited supply.

Figure 9 - Change in Real Estate Prices – South Okanagan

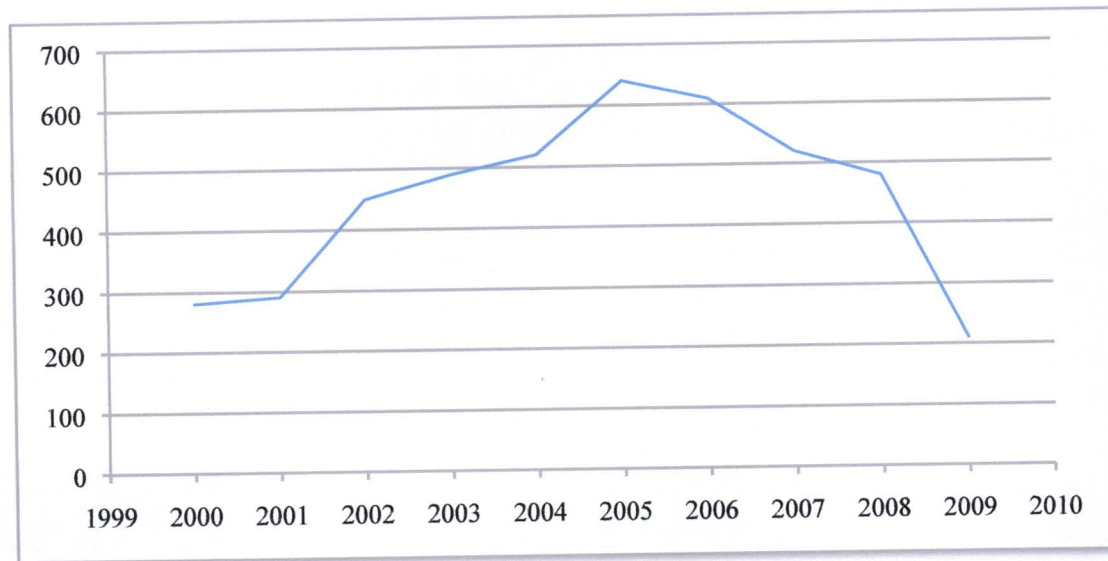


Source: South Okanagan Real Estate Board, 2009

With such a lucrative real estate market in a desirable tourism locale, the appeal of living or retiring in a picturesque rural environment necessarily plays second fiddle to the financial aspects associated with purchasing property in the South Okanagan. RTs able to obtain properties they desire can visit seasonally with the *intent* of a more permanent move. During this transition period, vacational rentals can help to offset the cost of the property purchase.

Reinforcing that RTs are attracted by financial incentives, several respondents (3) indicated that the current global economic crisis offered some respite from rapid urban development. They suggested that it afforded planners the opportunity to reassess the past development boom and begin to plan for the future of their communities. Figure 10 utilizes data from the South Okanagan Real Estate Board to demonstrate the decrease in sales during the current economic recession.

Figure 10 – Residential Unit Sales in South Okanagan



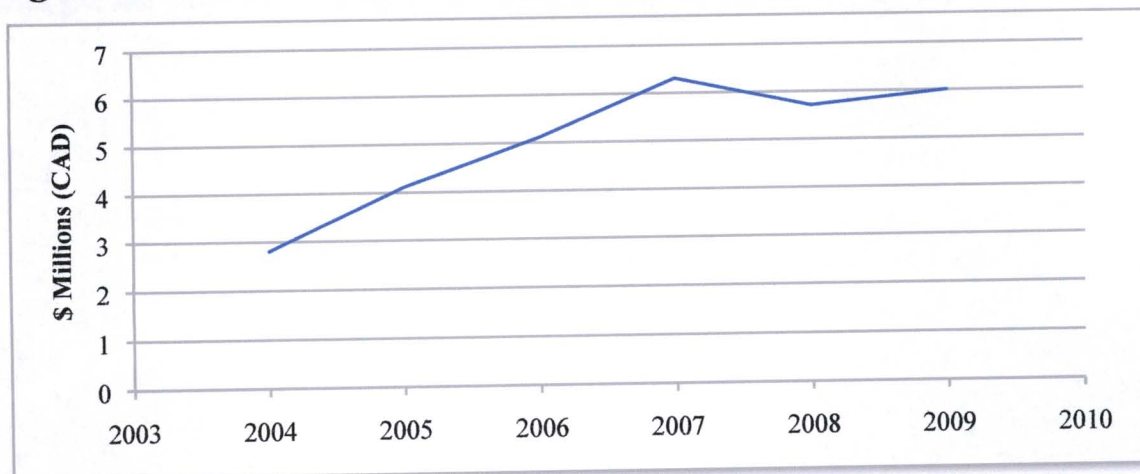
Source: South Okanagan Real Estate Board, 2009

With exorbitant prices, limited space within towns, and a still booming real estate market (as of 2008 and beginning to recover in late 2009), expanding into rural areas becomes the next logical step for developers.

4.5 Managing RT Growth

Figure 11 uses building permits to illustrate the level of development activity within Osoyoos' rural areas. It highlights a trend towards increased development.

Figure 11 – Growth in Overall Value of Building Permits – Area A



Although not all of this development is geared towards RT, an area with a high population of RTs (approximately 26%-44%) situated immediately adjacent to an urban area with approximately 37% RTs cannot dismiss their influence. Several respondents (5) indicated that managing RT growth and containing urban expansion was necessary to maintain the vitality of the rural areas. With limited land available in the urban areas of the South Okanagan, developers typically seek rural land within the regional district's jurisdiction, but geographically close to the towns. The argument presented by Williams et al (2000) becomes particularly relevant to the South Okanagan when explored in the context of the proposed Willow Beach development. Located immediately adjacent to the Town of Osoyoos in an environmentally sensitive area bordering Osoyoos Lake, this potential 1200+ unit development is geared directly towards attracting RTs. A key informant involved with this development commented:

Willow Beach is a disaster... Part of the problem is the developers went through the zoning process with the regional district, but kept in their hip pocket that they could always come back to the town for servicing. Had they gone through the town first, there would have been a far more onerous process than with the regional district.
(Key Informant #1)

That private developers were able to understand the deficiencies of the regional government model and use them to their advantage indicates a serious flaw in the current governance model. One town official noted:

RDOS are not set up to deal with that (urban development). They don't have the staff...Regional planning staff don't have the same clout. They can put themselves in harms way trying to hold the line
(Key Informant #1).

However, as a consequence of local and regional governance structures, the Town of Osoyoos was denied a vote on whether or not the Willow Beach development would proceed. And, due to the developments' proximity to the town and the fact that it lies adjacent to the lake shore, it remains in the Town's best interests to extend servicing to the development. A Memorandum of Understanding⁴ (MoU) signed between the Town of Osoyoos and the developers in 2008 stated:

While the decision to approve the Willow Beach development lies entirely with the RDOS, if the development is approved, the Town's involvement in servicing will eliminate potential discharge of treated effluent into the lake and ensure water quality for future generations

According to respondents, Willow Beach developers will be required to pay for the town's sewer extension, bringing the Willow Beach development along with 121 other residences onto the sewer system. While respondents noted benefits from the sewer extension, they also expressed dissatisfaction with the idea of the town servicing residential developments from which it did not collect taxes. Furthermore, the town's recent efforts to manage growth via a revised Official Community Plan are effectively undermined by developments such as Willow Beach that occur just outside of the town boundaries. For example, an urban growth boundary (UGB) was established to prevent urban growth stretching beyond town boundaries. With a large and distinctly urban development (Willow Beach) geared towards RTs occurring just outside of the town's borders, the usefulness of the town's urban growth boundary as a regional planning tool is seriously undermined. When asked about their strategies for

⁴ The MoU can be viewed online at:
<http://www.osoyoos.ca/siteengine/activepage.asp?NewsID=9>

managing RT growth, a key informant indicated that these urban growth boundaries were a primary tool:

...We have a UGB identified in our OCP. We're the first municipality to do that. Under the regional growth strategy there will be a requirement for all municipalities to put these in place – required under regional context statement. RDOS will have to put UGBs in place for their OCPs too. That will be more of a challenge and take longer (Key Informant #1).

Unfortunately, if the Town of Osoyoos is currently the only area in the South Okanagan with a UGB, there is little the town can do outside of its boundaries to discourage urban development. Until the regional district (RDOS) implements UGBs, containing urban sprawl developments like Willow Beach will remain a difficult task.

The vast majority of respondents agreed that the current regional governance model was ineffective in managing such forms of RT-driven growth. Key informant perspectives on the challenges of current governance structures with respect to RT growth were numerous. The following set of quotations reflect their collective positions:

Table 10 – Governance Model and Residential Tourism Growth:

Is the current governance model effectively managing growth driven by residential tourists?

Absolutely not. Couldn't come up with a worse model if you tried.... I think it's a deplorable system in rapidly urbanizing areas. In the Okanagan I think it's a failed system. I will be very happy when it disappears. (Key Informant #1)

The whole regional district approach is absolutely ineffective governance.,,I'm a very strong proponent of a District Municipality. (Key Informant #16)

One of the problems is rural people are not happy with municipalities telling them what they can and cannot do. Rural people can't tell municipalities how to manage their growth, but municipalities tell rural people how to manage their growth. That creates an inequity. Antithesis to good governance. There are better systems in my opinion. (Key Informant #3)

In terms of managing growth? The Regional District does have a Regional Growth Strategy that we don't agree with in the area of growth management. We agree with everything else, but we do not agree with that... they're leaning towards urban sprawl. (Key Informant #10)

Several respondents (4) indicated they were proponents of switching to a district municipality. Under this system the electoral areas immediately adjacent to the towns would be incorporated under one governance system – a mayor and council. A district municipality system would afford the South Okanagan greater control over RT developments like Willow Beach. Several respondents (4) felt they could better manage growth in urban and rural areas if they were incorporated under one system of governance. According to the Community Services Statutes Amendment Act (2007), switching to a district municipality would afford the following benefits:

- Residents of the rural area would gain increased representation and responsibility through the election of a municipal council and autonomous decision-making in terms of road maintenance, policing and fire protection. Land use decisions would also be made closer to home by elected community officials instead of regional directors.
- Restructuring could lead to more equitable sharing of the industrial and business tax base, economies of scale resulting in lower per-capita service provision, and better integration of infrastructure.
- A stronger, unified political body would provide continuity of planning and services. This change would help to establish stronger growth management plans and minimize urban-rural interface issues.

Unfortunately, the benefits of employing a district municipality system in the South Okanagan are greatly outweighed by perceived drawbacks. Three major problems exist:

- Amalgamating the town and electoral area would greatly increase the municipality's size, thus reducing the portion of provincial subsidies received for policing costs
- All roads in the electoral areas are currently maintained by the Province. Restructuring would require maintenance of all roads except for provincial highways be transferred to the new municipality

- As a rural area, farmhouses pay a reduced property tax. Once the area is restructured into a district municipality, this tax would be phased in over a five-year term.⁵

Importantly, any change in governance that increased property taxes in rural areas would be met with fierce opposition. Several respondents indicated that the rural population was adamantly opposed to any form of district municipality. Respondents also indicated any politicians seeking such changes would inevitably face the end of their political careers. This fierce opposition underscores the inherent problems with growth management in the South Okanagan. While a district municipality would have benefits in terms of establishing a comprehensive growth strategy, switching to such a system is made difficult by inconsistencies in the several 'layers' of governance within the South Okanagan. Electoral areas are governed by the regional district and cling to provincial assessment legislation that reduces property tax on farms. Towns are undermined by growth in rural areas but are unable to prevent or control it. Given the clearly mismanaged interactions between municipal and regional governments, urban expansion and amenity-driven growth appear inevitable. Furthermore, even under a district municipality system there are no guarantees that local communities will not opt to limit urban expansion. Fortunately, provincial legislation such as the Agricultural Land Reserve preserves agricultural lands and trumps local and regional land use policy. Section 4.6 discusses the impact residential tourism has on these agricultural lands in the South Okanagan

⁵ Information on Rural Property Tax procedures can be viewed online at:
http://www.sbr.gov.bc.ca/individuals/property_taxes/rural_property_tax/Tax_rates/hints.htm

4.6 Pressures on Agricultural Land

Aggregate statistics demonstrate a rising trend in exclusions from the Agricultural Land Reserve in the South Okanagan. Table 10 demonstrates that, of the 4892 ha excluded from the South Okanagan's ALR, the vast majority (96.7%) was removed between 1998 and 2008.

Table 11 – ALR exclusions in the South Okanagan

Total Exclusions (ha) 1974-2008	Exclusions (ha) 1974- 1998	Exclusions (ha) 1998- 2008
4892	157	4735

Source: Agricultural Land Commission, 2009

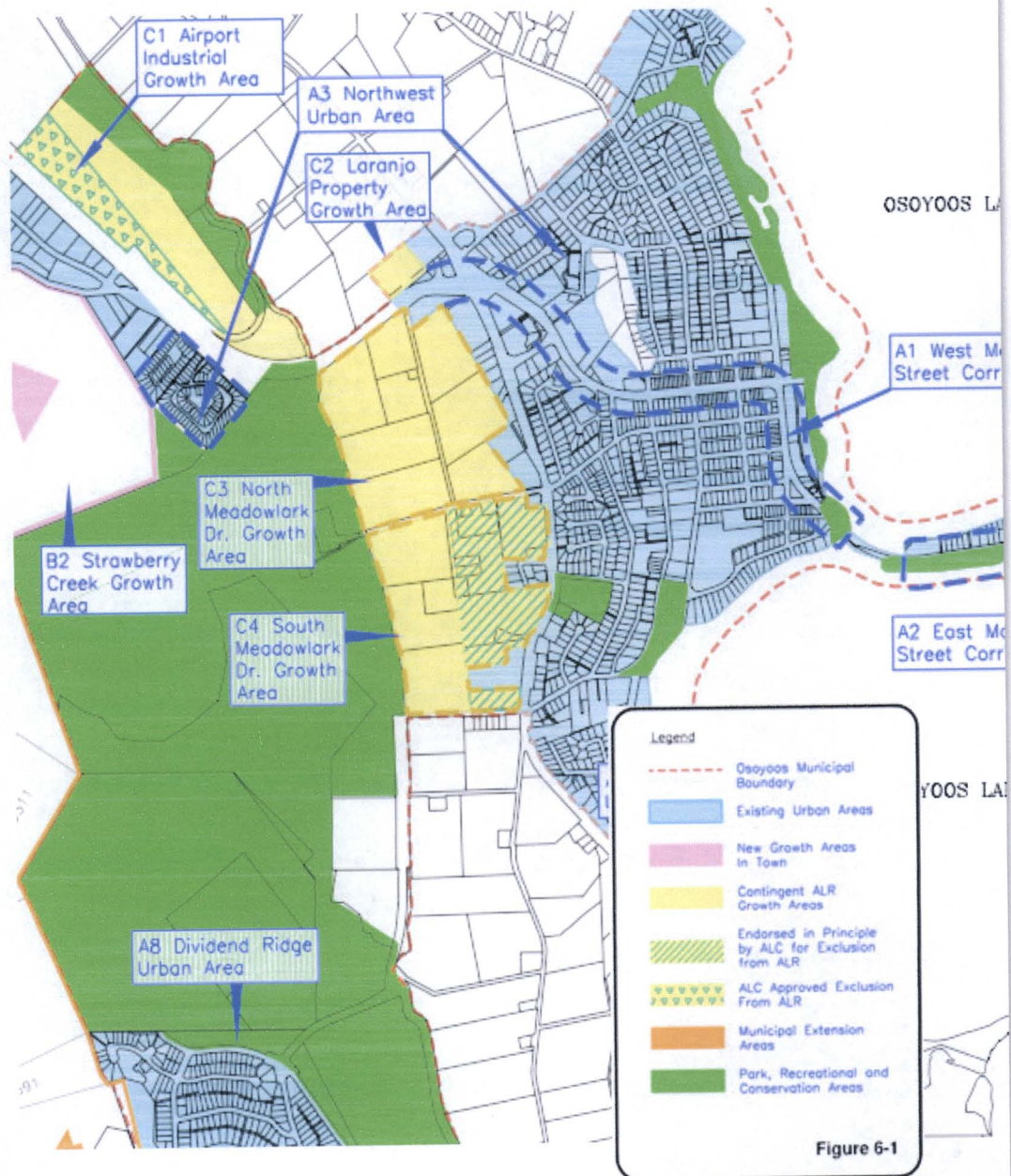
Although these exclusions cannot be directly linked to RTs, in areas with a high population of RTs, any conversion of agricultural lands to residential developments is difficult to disentangle from their influence. Over the past ten years development pressures have increased substantially in the South Okanagan, likely contributing to the rise in ALR exclusions

One instance of direct conversion of land from the ALR that could be geared towards residential tourists was discovered in the Town of Osoyoos. Although not a major threat to agriculture in the area, this example serves as an indicator that land can and is converted from the ALR into urban usage. While the changes appear incremental and small, over the course of a few decades small changes can have dramatic consequences.

In 2003 the Town of Osoyoos revised its Official Community Plan to include "contingent ALR expansion areas." Figure 12 illustrates the contingent expansion areas highlighted in yellow. These areas, according to local planners and politicians, are intended to be used as sites for affordable housing.

The yellow areas are contingent ALR growth areas...We wanted to identify ALR areas that could be converted to urban use over the next 20 years. This [plan] would give certainty to farmers and developers instead of playing the game of trying to test the boundaries all the time (Key Informant #1)

Figure 12 – Contingent ALR Expansion Areas - Osoyoos



However, respondents were not able to clearly identify a plan to implement affordable housing. When asked what measures would ensure that the developments were not utilized by RTs, one respondent stated that “it will be less expensive housing and affordable housing. People could use it that way (as a vacation home) but that won’t be the focus.” (Key Informant #1). Of the five areas listed as “contingent ALR expansion areas,” only sections C3 and C4 mention affordable housing in their development potential as defined by the Official Community Plan. Table 12 reproduces a section from the OCP that illustrates development goals for these parcels.

Table 12 – Development Potential for Contingent ALR Expansion Areas

Area	Status	Development Potential
C1 – Airport Industrial Growth Area	In Town/some ALR/Provincial Crown	Light Industrial (developable area to be determined)
C2 – Laranjo Property Growth Area	In Town/ALR	Highway-orientated tourist commercial or large retail commercial store
C3 – North Meadowlark Drive Growth Area	In Town/ALR	Large format retail commercial development/small-lot TND subdivision with a strong affordable housing component
C4 – South Meadowlark Drive Growth Area	In Town/ALR	Affordable housing on undeveloped parcels
C5 – Wish Property Growth Area (not depicted in Figure 4.6)	In Town/ALR	Tourist or retail commercial development requiring convenient highway access and large parcel size

Source: Town of Osoyoos OCP, 2009

Three respondents from Osoyoos stated that the contingent ALR expansion areas were to be used for affordable housing. The intended development listed above suggests a potential for a great deal of tourism-oriented development. Perhaps these tourist-oriented developments will offset the cost of building affordable housing. While respondents insisted the developments would consist of “less expensive housing,” there were also indications that only 15% of certain developments would be set aside as affordable housing.

Unfortunately, it is very difficult to have 15% of a development set aside for affordable housing if the entire development does not sell for a premium – a difficult task if the development already consists of “less expensive housing”. A respondent from the Town of Oliver directly involved with several similar development proposals over the past decade explained the difficulties:

The problem is for the size of land available at any time – if you say 10% of 15 units, if you try to increase it they say it’s not economically viable to do...We’ll have to raise the price and then it (the entire development) becomes impossible to sell. (Key Informant #14).

The need for affordable housing, especially in the town of Osoyoos, stems directly from the pressures created by RT. With new housing often exceeding \$495 per square foot (Everest, 2008), young families and local residents are hard pressed to find houses they can afford. However, several respondents indicated that the pressures of RT had turned their interests toward affordable housing issues, perhaps serving as an indirect benefit of RT. The need for affordable housing might not have been identified without pressures from RT.

Regardless of the difficulties the Town of Osoyoos may face in planning for affordable housing, the town considers the impact on the ALR to be small. Two

respondents stated that the land within the contingent ALR expansion area was not being actively farmed. This reasoning, however, is irrelevant for several reasons. First, non-productive ALR land still provides a necessary buffer between urban development and productive farmland. In the case of Osoyoos, each parcel of land within the contingent ALR expansion is directly adjacent to a larger section of the ALR. Second, land was initially included in the ALR based on soil productivity (Garrish, 2003). The majority of land within the ALR currently thought to be “unproductive” often reflects a consideration based only on the size of the parcel and its monetary value within the current economy. Excluding such land defies the initial purpose of the ALR (to preserve productive farmland) and is necessarily short-sighted. While small parcels of the ALR may currently be more valuable as urban expansion areas, this valuation is based only on present market conditions.

Despite plans for expansion into the ALR, respondents indicated that the ALC remained strong in the Okanagan region, and the ALR as legislation was/is effective at preserving agricultural lands. Although developers (and often farmers) would like to remove lands from the ALR for various types of development, few parcels had been removed specifically for properties marketed towards RTs.

As far as I am concerned one of the best planning tools has been ALR legislation...It ticked them off what he brought in...but as an organization [it] has stood the test of time (Key Informant #16)

You see the ALR, ... If we didn't have it, just imagine what this valley would look like. Pretty bad...Talk about urban sprawl...You'd have pockets of homes, and everytime you have orchard and residential you have issues... Unbelievable issues (Key Informant #10)

These sentiments only reinforce how absolutely necessary the ALR is in the South Okanagan. Maintaining a strict policy of zero net-loss of agricultural land is necessary to not only preserve agricultural practices but to maintain the character of the South Okanagan. Policies that complement agricultural preservation should be coupled with philosophies on development that look beyond short-term economic gain and focus on preserving agricultural lands for future generations.

Although respondents felt RTs had little impact on agricultural land, inconsistencies appeared between opinions of rural politicians and planners and urban politicians and planners when asked about the impact of RT on agriculture. Perhaps underscoring different ideologies on preservation and development, rural politicians and planners⁶ often perceived a greater threat to agriculture than urban politicians and planners. Table 13 illustrates these differences:

Table 13 – Has residential tourism impacted agricultural land throughout the South Okanagan?

Urban politician and/or planner	Rural politician and/or planner
I don't think it is impacting. Agriculture would be more affected by policies of ALR where people can put homes for relatives. (Key Informant #1)	Yes...What I'm interested in is the farming area – the place where the plants actually grow...We've got to protect them. (Key Informant #2)
I don't think any of them have really been in the land reserve...I don't think it's had a direct impact. (Key Informant #13)	Yes, obviously if you buy land and, I think it does happen a lot, you can have farm status, ag zone benefit... you are allowed to have single family dwelling on an ag zone lot, but it's not really the intent strictly from a farming perspective. (Key Informant #5)
Of course, land is more valuable out of the ALR. There is probably a lot of pressure but there are pretty strict rules	Yes. Just look at applications in the regional district. We have more development trying to come in... (Key

⁶ A rural politician/planner is a person elected to political office in a region outside a township (e.g. electoral area A, B, C, etc), or a planner with direct responsibilities for rural issues on a daily basis (e.g. planner with the regional district, consultant, etc).

so it's difficult. (Key Informant #9)	Informant #11)
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This divergence of views may be attributed to the shorter time considerations of urban politicians. Although political terms only span 3 to 5 years for both rural and urban politicians, rural politicians are often life-long farmers and are therefore more attune to changes in the agricultural landscape that span decades or more.

One of the more important impacts on agricultural lands echoed by several respondents (4) was the “sneak attack” stemming from hotel structures built on farms. These structures are not geared towards RTs, yet offer a similar, albeit more temporary, experience. The real threat from these establishments, according to several informants (3), comes when farmers become hoteliers. At this point, the farm is just as much ‘for show’ as it is for production; the agricultural ‘landscape’ or rural idyll becomes more important than the functioning agricultural ‘place’ (McWatters, 2009). The Agricultural Land Commission (ALC) altered regulations to allow small hotels (with 10 or fewer sleeping units) on active farms in an effort to bolster on-farm income. Two respondents noted that for several farmers, hotels were becoming more important financially than the actual farm itself.

Despite numerous pressures on the ALR in the South Okanagan, the ALR has remained relatively stable in terms of size. However, land within its boundaries represents only a fraction of the region’s farming base. Other land within rural areas often has the potential to be farmed, or plays a part in maintaining the rural agricultural character of the region. Consequently, development within rural areas does not have to be within previous ALR land to

threaten agriculture. Much of the amenity-driven development occurs in areas outside of but often adjacent to ALR lands. While not directly converting agricultural land for their purposes, these developments have important potential impacts on agricultural practices. For instance, conflicts often arise on the rural/urban fringe as agriculturalists and RTs contest appropriate land use:

There are noises associated with farming: cannons, bird guns, etc. People don't like that. There's also the use of pesticides, herbicides, harvesting up early [in the] morning. All the nitty gritty of farming in reality versus [the] quaint look of having houses next to an orchard - people don't realize that until they move in and then start complaining to us. (Key Informant #5)

Such conflicts in the urban/rural fringe help emphasize differences between 'landscape' and 'place'. RTs, according to several respondents, fail to appreciate the reality of living in an active agricultural area. Although respondents admitted the complaints about agricultural practices could not be isolated to RTs alone, a lack of tolerance appeared more pronounced amongst recent migrants – Having grown up in the area or become accustomed to agricultural practices, long term residents were more accepting.

Regulating land use to accommodate a variety of uses is a difficult task. According to Part 2 Subsection 1 of the Farm Practices Protection Act

(a) the farmer is not liable in nuisance to any person for any odour, noise, dust or other disturbance resulting from the farm operation, and

(b) the farmer must not be prevented by injunction or other order of a court from conducting that farm operation.

Municipal and regional governments have a variety of zoning and planning tools available to mitigate and manage urban/rural interface issues. Effectively

using these tools to minimize the impacts of RT on agriculture in the South Okanagan depends on the successful navigation of several layers of governance. Chapter 5 discusses these tools and highlights some difficulties in their successful implementation.

4.7 Conclusion

The influence of RTs on the growth and development of the South Okanagan is undeniable. While respondents stated that RTs were only partially seeking a rural idyll, respondents did agree that it played an important role in attracting tourists to the region. Importantly, they saw the seasonal influx of short-stay tourists contributing dramatically to the vibrancy of the South Okanagan. This vibrancy is expressed: psychologically through an intangible “buzz” identified by several respondents; and economically through the creation and support of local businesses and a booming real estate market.

The difficulties associated with managing RT growth stems mainly from inadequate interactions between several layers of government. While strong provincial legislation in the form of the ALR prevents the region from being consumed by urban sprawl, the inability of the regional and local governments to successfully manage growth slowly erodes urban/rural boundaries and impacts both the rural landscape and agricultural practices. Compounding this problem, provincial assessment legislation prevents towns from easily transitioning into district municipalities. For the most part, this is happening because of a large percentage of rural farmers who would see their property taxes rise dramatically under a new governance system.

Preserving the rural character in the South Okanagan is critical to not only maintaining a vibrant tourism industry but also retaining one of the most productive agricultural regions in southern BC. Diminishing the productivity of this landscape in exchange for RT development is inherently unsustainable. Food security and the viability of productive agricultural lands are issues that all forms of government should address proactively.

RT in the South Okanagan has also had important social and economic effects. These include decreasing business dependence on short-stay tourism and increasing property values – effectively driving young families out of the housing market. Understanding these challenges is the first step towards changing the problem of RT into an opportunity. Chapter 5 further discusses this challenge and, where possible, draws further linkages between the findings in this Chapter and the theoretical underpinnings presented in Chapter 2.

CHAPTER 5: DISCUSSION

5.1 Revisiting the Framework

As Williams et al (2000) argue, temporary fluxes in short-stay tourists provide a critical mass in population, allowing for the creation of consumption-oriented amenities and services. Combined with the first phase of Williams et al's (2000) argument - that these short-term visits define the search spaces of potential semi-permanent or permanent migrants – migrants and residential tourists follow. This process creates a positive feedback loop that, taken as its own process, could be seen to drive Butler's (1980) model for resort destination development. What Williams et al (2000) do not include in their model, however, is the impact on the surrounding land that accommodates this infrastructure and development. Development examples (e.g. Willow Beach) adjacent to the Town of Osoyoos illustrate the accuracy of Williams et al's (2000) model and help to link processes of urban expansion with increases in tourism and RT. Taken in this context, RT should be considered an important issue for growth management debates in the South Okanagan. However, the issue is rarely discussed among planners and politicians.

Irwin et al. (2003) argued that framing growth management as a public policy issue is difficult for several reasons. First, growth pressures are difficult to measure empirically, with measurement methods often unique to each area. Furthermore, ambiguous and varied definitions of sprawl are partially

responsible for this difficulty. Second, growth management tools are often varied and cumbersome. For example, Irwin et al (2003) argue the term “smart growth” – compact, transit oriented development – is poorly understood and difficult to achieve. As a concept that often must be ‘retrofit’ to existing communities, decision makers often see the costs as outweighing the benefits. Additionally, with limited resources to track and understand long-term changes, few communities have been able to assess the effectiveness of their growth strategies, leading to a lesser weighting on their importance to the region. And, as growth management issues are often a local government decision, discussions can easily become segmented and overlook regional trends. In the South Okanagan, the lack of a finalized regional growth strategy has prevented the emergence of a holistic vision for the future of the region.

Irwin et al’s (2003) study of urban growth on the rural/urban fringe is relevant to the issue of residential tourism in the South Okanagan for several reasons. First, Irwin et al’s (2003) study found that prime agricultural land had a high probability of being converted to urban land. Their study argued that despite the opportunity costs associated with converting agricultural land to urban land, the immediate economic benefits far outweighed the costs. Thus, in any society that values urban development over agricultural production, agricultural land has a high probability of conversion. Second, Irwin et al (2003) found that neighbouring land use (within 400m) significantly impacted the conversion rate of underdeveloped land (including farmland, open spaces, vacant parcels). This finding demonstrates the importance of maintaining strong barriers between urban/rural areas. In the Town of Osoyoos, for example, the contingent ALR

expansion areas, while not actively farmed, provide an important buffer between urban and rural areas. Any arguments for urban expansion into these areas based on the productivity of the rural lands in question is therefore incomplete at best.

5.2 The ALR as a Growth Management Tool

With only 25-50% of land within the Agricultural Land Reserve actively farmed (Garrish, 2003), the value of the reserve does not lie within its ability to encourage agriculture. In fact, the land reserve has been criticized as lacking a clear mandate and definable purpose (Garrish, 2003). However, the true value of the reserve, argues Garrish (2003), lies in its role as “final guarantor and arbiter in the conservation of the remaining open spaces in heavily urbanized areas” (pp. 27). In rapidly growing tourism destinations, and destinations experiencing a marked growth in RT, the growth management role of the ALR becomes even more critical.

In the South Okanagan, urban cores are primarily surrounded by the Agricultural Land Reserve. Expansion of these urban areas is largely stymied by this reserve. Pressure to expand is fueled in part by the presence of residential tourists in proximate urban areas. Additionally, many properties (approximately 20%) within the Agricultural Land Reserve of the South Okanagan are already occupied by RTs. This fact calls into question the ability of the land reserve to actually encourage agriculture. Although part of the reserve’s initial mandate stated that “No person shall occupy or use agricultural land designated land reserve...for any purpose other farm use” (Garrish, 2003, pp.37), farmland is ultimately retained through private ownership. If the owners are residential

tourists who choose not to pursue a farm use for their property, no regulation exists to prevent their decision.

Fortunately, the presence of residential tourists on the land reserve may have positive impacts. Although the land may not be actively farmed, the appeal of owning a large tract of property in a picturesque rural environment works to preserve farmland for potential *future* farm use. Garrish (2003) argued that the success of the ALR as legislation is due to the ability of the ALC to link the preservation of farmland with community benefits and quality of life issues associated with the preservation of rural landscapes. These benefits are sought by residential tourists seeking properties on agricultural land. Although these issues have little relation to farm production, they do prevent the conversion of agricultural lands to urban lands.

That there are benefits associated with the presence of residential tourists on agricultural land raises the issue of utility over preservation. Past research (e.g. Garrish, 2003) has argued that the preservation of the land reserve within a free market system should not succeed in the absence of a viable farm economy. However, the issue of residential tourism has raised awareness that the landscape is valuable beyond its productive capacity.

Our economy currently values development and urban expansion over agricultural production and food security. Although this value system is inherently unsustainable – valuing current needs over those of future generations – the ALC recognizes that land is more valuable outside of the reserve. This point is underscored by recent adjustments to the land reserve legislation that allow for increased on-farm revenues in the form of tourist accommodations (see: Ch.4).

These changes represent an indirect form of subsidy and an attempt to foster greater value for agricultural land. Although these policy changes do not directly encourage farming, increasing on-farm income encourages the preservation of agricultural lands by allowing property owners to profit by keeping lands within the agricultural reserve.

Several respondents (4) indicated that tourist accommodations on agricultural land represented a type of “sneak attack” that ultimately threatened farm practices. Respondents stated that many of these accommodations were so successful/profitable that owners become hoteliers rather than farmers. However, the popularity of these accommodations serves to underscore two important points: First, the agricultural landscape has an aesthetic value that greatly contributes to the appeal of the South Okanagan. While respondents indicated that this aesthetic value was not necessarily a draw for residential tourists, it clearly remains a top priority for short-stay tourists. Second, as Williams et al (2002) argued, the presence of short-stay tourists allows for the creation of amenities and consumption-oriented services that attract RTs. Consequently, the agricultural landscape indirectly works to attract RTs.

5.3 Planning to Protect Agriculture and the Rural Landscape

Although local or regional governments have no strategies that directly deal with managing or containing development geared towards residential tourists, several common land-use planning tools can be of use. Table 14 provides a summary of these tools/strategies. These tools/strategies can complement existing provincial ALR legislation and help communities manage RT.

While the following tools and strategies are commonly the jurisdiction of the regional government, in most cases the towns and regional district are required to cooperate in facilitating effective implementation. Tools such as regional growth strategies, for example, are created by the regional government with input from towns and electoral areas. Other tools, such as agricultural area plans require the cooperation of urban and regional governments as they deal with zoning issues on the urban/rural interface.

Table 14 – Land use Tools and Strategies to Preserve Agriculture

<i>Regional Growth Strategies (RGS)</i>
A regional growth strategy can provide ‘big picture’ guidance to member municipalities. All local Official Community Plans (OCP) must contain a Regional Context Statement (RCS) that sets out how the local government will meet the goals set out in the Regional Growth Strategy (RGS). And, in theory, zoning and infrastructure development must be consistent with the regional growth strategy. Adopting a strong approach to agricultural and rural land preservation in their RCS can help reduce speculation within municipalities, by reducing the likelihood that rural and/or agricultural lands will be re-zoned as residential.
<i>Official Community Plans (OCP)</i>
Official Community Plans do not directly regulate land use, but provide high-level guidance, similar to the function of a regional growth strategy. An OCP can outline a community’s priorities in terms of land use, agricultural activity, and related aspects such as water use. Some of the strongest tools that an OCP offers is the ability to create development permit areas, modify zoning, create edge-planning areas, and regulate subdivisions.
<i>Agricultural Area Plan (AAP)</i>
Creating an agricultural area plan allows local governments to focus specifically on agricultural issues. This plan, if created, will serve to inform goals set out within the OCP. An AAP goes further than an OCP as it identifies threats to agriculture as well as lays out specific strategies to strengthen the local agricultural industry. An AAP typically contains a high level of detail, and is very site specific. The plan may address a number of issues in detail, including: ALR/urban interfaces, water usage, environmentally sensitive areas, transportation, and economic development strategies. In addition, many AAPs utilize geographic information systems (GIS) mapping and agricultural land use inventories to aid local government in development decision-making.
<i>Zoning and subdivision regulation</i>

Zoning can be used to establish development setbacks, regulate building height and size, control density, and determine signage and parking requirements. Most importantly, local governments can use zoning to designate land in the ALR as land to be used for agriculture. If land is zoned for agriculture, even once it is removed from the ALR, developers would have to convince the local or regional government body to alter the zoning. Backed up by a strong commitment to agriculture in the OCP or RGS, altering the zoning is unlikely.

Beyond zoning for agriculture, local governments can limit subdivision of ALR land by creating large minimum lot sizes. Even if the ALC approves a subdivision of ALR land, local governments are not required to alter zoning. As large lot sizes are typically required to make agriculture a profitable venture, subdividing the land can make it uneconomical to farm. Creating zoning that requires large minimum lot sizes in ALR land significantly reduces speculation that the land in the ALR will eventually become available for residential development

Development Permit Areas (DPA)

Section 919.1 of the Local Government Act states that “an Official Community Plan may designation development permit areas for one or more of the following reasons: Protection of farming.” Typically development permit areas are applied to areas adjacent to farmland. However, if the local government so wishes, development permit areas could be used to restrict

The management tools in Table 14 can be used to manage growth driven by residential tourists. Respondents often commented on these tools and strategies, and offered remarks on their strengths and weaknesses. Each of these tools is discussed below:

Regional Growth Strategies

The Okanagan Similkameen has been developing a regional growth strategy for over five years (personal correspondence). The regional growth strategy⁷ attempts to provides general guidance to local municipalities by taking a holistic approach to planning urban growth and rural preservation. Part of the strategy discusses the preservation of the agricultural land base. The strategy recognizes that farmland “competes with urban expansion, rural non-farmer

⁷ The regional growth strategy draft is available online at: <http://www.rdos.bc.ca/index.php?id=93>

residential development...for land and water resources” (p.47). The strategy also recognizes the value of the agricultural land reserve and states the importance of preserving that asset. Finally, the strategy outlines a toolkit local governments can develop for what to help them protect agricultural land in their community. The toolkit includes approaches for the use and application of Official Community Plans, zoning regulations, Agricultural Area Plans, and Agricultural Advisory Committees designed to manage urban growth and protect farmland.

Unfortunately, due to the weak regulatory powers of regional governments within BC (Tomalty, 2002), the above strategy constitutes little more than suggested guidelines. As regional growth strategies are voluntarily adopted by member municipalities, the inclusion of strong growth controls is difficult if faced with local opposition. Despite the frequent use of zoning bylaws to create buffers between agricultural areas and residential areas, regional governments do not provide adequate support for the creation of Agricultural Advisory Committees, nor the development of Agricultural Area Plans. Furthermore, the regional strategies contain broad goals, not policies. In contrast BC’s Capital Regional District’s growth strategy has similar goals, but includes a policy which states that 90% of new development must occur within designated urban growth boundaries. While the RDOS encourages cluster development where possible, no quantitative targets for growth areas are set. With 26-44% of rural homes purchased as second homes, and an overriding trend for these homes to be located on large tracts of land, the regional growth strategy is clearly not directing growth towards urban areas. Several respondents indicated the regional growth strategy had been weakened to the point where it was a recipe for sprawl.

The Regional District does have a Regional Growth Strategy that we don't agree with in the area of growth management. We agree with everything else, but we do not agree with that. They're leaning towards urban sprawl. We're opposed to that. There are existing areas that can be expanded without incorporating new ones. We've voiced our opposition. (Key Informant #10)

According to respondents, the RGS encourages urban sprawl because it represents the viewpoints of far too many communities. Rural communities want development just as urban communities want similar opportunities. As the regional growth strategy must have the approval of all communities involved, the current strategy is diluted and represents the lowest common denominator in terms of growth management. For example:

It's a battle because a lot of directors don't want to do anything to impede growth – growth at all costs. Some people think it will be good for the economy - forget about smart growth, forget about regional growth strategy...It restricts things. I think it's important to grow properly if you're going to grow. (Key Informant #2)

It's not a growth strategy. It's being worked out as a plan - one vision for all of the RDOS as opposed to a strategy. The plan denies the existence of the communities (that are unincorporated) because it says the growth areas are the incorporated areas. If I was a city councillor I'd want all the growth too because I'd want the tax base. (Key Informant #3)

These comments underscore the tension between rural areas and towns. Although the regional growth strategy has been in the development stage for over five years, progress has been slowed by towns and electoral areas competing for development potential. Ironically, the holistic planning benefits a regional government is supposed to provide have been undermined by the nature of regional governance itself (see section 4.5 for more information).

Official Community Plans

For the rural areas in the Okanagan Similkameen, the official community plans are derived from a cooperative process with the regional district. The OCPs contain several policies for preserving the agricultural land base. For example, section 6.3 (1) of rural Osoyoos' plan states that decisions about water quantity and quality should be made "with the interests of the agricultural community as the first priority" (19). As residential developments compete directly with agriculture for water usage, setting agriculture as a priority should serve to *limit the expansion of residential areas*. Section 6.3 (13) states that subdivisions of land within the agricultural land reserve will only be considered if i) approved by the Agricultural Land commission and ii) subdivision will allow for more efficient use of agricultural land. Unfortunately, with only 14% of rural land within the ALR (WRG, 2003), a great deal of land is left open for residential development. While zoning and subdivision regulations may prevent medium to high-density residential development, low-density 'estate' homes are well within the limits specified. And, as property tax assessment data demonstrates, approximately 26% of homes within the rural areas are owned by residential tourists

None of the OCPs for rural areas in the South Okanagan mention anything about avoiding urban sprawl. Developments in rural areas directed towards residential tourists often create urban enclaves that promote sprawl. The proposed Willow Beach development discussed in Chapter 4 offered one example. Another example, the Regal Ridge development located twenty minutes outside the Town of Osoyoos, offers high-end suburban housing in a rural setting. Although rural Osoyoos' plan discourages urban development in rural areas, it

lacks strong language, stating only that “the regional board considers that low density residential development may be created in the rural area, but that the development must respect the character of the rural area...” (p.29).

These sprawling communities are an example of growth management problems created by an increase in residential tourism. One reason these communities continue to develop is the lack of a regional context statement in the Official Community Plans. The struggles over attracting or limiting growth that plague the development of the regional growth strategy carry over into the Official Community Plans and largely prevent a holistic growth strategy emerging for the rural regions of the South Okanagan.

Zoning and Subdivision Regulation

A number of municipalities throughout BC have set zoning bylaws to create large minimum lot sizes in agricultural areas. BC’s Spallumcheen Valley, for example, maintains a 30.5 hectare minimum lot size for agricultural zones. The City of Abbotsford has a minimum of 16 hectares, while the City of Pitt Meadows has a minimum of 8 hectares (Curran, 2005). Zoning regulations in the Okanagan Similkameen, however, are not as stringent. Although the rural zoning bylaw consistently lists agriculture as the principle use under every subcategory, minimum lot sizes for these lands can be as small as 0.4 hectares. Land zoned specifically for agriculture has a minimum lot size of only 4 hectares⁸. Relatively small minimum lot sizes allows for the proliferation of estate residential

⁸ Land use and zoning bylaws can be viewed online at: <http://www.rdos.bc.ca/index.php?id=99>

developments, which the tax assessment analysis indicates are common throughout the South Okanagan.

Development Permit Areas

Respondents in the South Okanagan indicated that edge conflicts were commonplace with residential tourists failing to appreciate the true nature of an active agricultural area. Regional planners and local politicians indicated that short stay tourists and residential tourists often complained about noises from bird-scare cannons, and farming equipment. Residential tourists, however, spend a greater length of time in the area and have been known to petition council to limit farming activity. Local and regional governments can creating edge planning areas can serve to limit these conflicts and help to protect/preserve agricultural land (Curran, 2005). The South Okanagan however, does not employ any edge planning areas. With only one planning technician and three planners on staff, the choice not to include development permit areas is likely based on limited human capacity constraint issues (personal correspondence).

Agricultural Area Plans

Despite the prominence of agriculture in the Okanagan Similkameen, only rural Oliver has formulated an Agricultural Area Plan. This plan addresses agricultural practices in both the Town of Oliver and the regional district, setting agriculture as a priority over residential development. However, while the town's OCP references the plan, the OCP for the rural district does not, hampering the effectiveness of the plan. Regional planners and politicians responsible for formulating the plan indicated that staff resources and time constraints were

responsible for the lack of implementation strategies. Importantly, rural Oliver is currently the only area with an AAP close to being implemented.

CHAPTER 6: CONCLUSIONS

6.1 Research Summary

This research examined the extent to which RT has impacted rural land use throughout the South Okanagan. The assessment was driven in part by theoretical models of tourism and land use (Williams et al, 2000) and informed by Gill and Williams' (2007) framework for exploring tourism-led amenity migration. Both models were useful in untangling the relationship between human movements to areas possessing high quality of life resources and frequent short-stay tourist visits. The framework created by Gill and Williams (2007) also aided in an exploration of the regulatory and managerial approaches emerging to contend with the transformative implications of RT in rural areas.

This research set out to explore the following issues:

1. What role does the rural landscape play in attracting RTs and tourists?
2. To what extent is RT impacting the agricultural landscapes in the case study region?
3. Are the pressures of residential tourism adequately addressed with existing land-use management strategies? Are new strategies and/or methods required to address these pressures?

A case study facilitated by key informant interviews explored these research questions by: determining the extent of RT within the South Okanagan; assessing changes to the agricultural land base; exploring the motivations of RTs as they relate to the rural landscape; and discussing the effectiveness of current and future strategies to manage the interactions between RT and agricultural land use within a local and regional context.

Findings from the South Okanagan indicated that the rural landscape only played a minor role in attracting RTs. Previous literature (e.g. McWatters, 2009; Moss, 2006) argued that the natural landscape played a significant role in the relocation choices of RTs. In the South Okanagan, however, climate emerged as the leading factor, followed closely by built amenities and a sense of vibrancy created by short-stay tourists. Importantly, previous market research (e.g. Williams and Dossa, 2003; Tourism BC, 2004) confirmed that the agricultural landscape of the South Okanagan plays an important role in attracting short-stay tourists. In this sense, the agricultural landscape can be seen as indirectly driving RT in two ways. First, as short-stay tourist visits are often a precursor to semi-permanent or permanent forms of migration, a great deal RTs first visited the area as tourists. A study by the Similkameen Valley Planning Society, for example, confirmed that upwards of 80% of amenity migrants (a closely related category) were tourists first. Second, attracting short-stay tourists allows, as Williams et al (2000) argue, for the establishment of built amenities, which were cited by respondents as a major attraction for RTs.

Interestingly, urban respondents indicated that RTs had little to no impact on agriculture in the area. Changes within the ALR, for example, were minor. However, a more indepth exploration revealed several implications of RT in the rural landscape:

- 1) RTs increase real estate prices and thus make conversion of rural land into urban developments very appealing for land owners. Such speculation drives many applications for removal from the ALR
- 2) A high concentration of RTs in urban centers creates pressure to expand urban boundaries. Even if boundaries are not expanded, urban/rural buffer zones are decreased, which enhances conflicts between urban and

- agricultural areas. RTs, having moved to the area for quality of life purposes, are often less accommodating of agricultural issues
- 3) Issues related to urban expansion and sprawl are worsened by difficulties associated with a regional governance structure. The lack of a regional growth strategy, for example, allows rural areas to accommodate urban growth.
 - 4) A high percentage (20%) of homes occupied by RTs within the rural areas are also within the ALR. The attached lands may or may not be used productively.

The difficulties encountered by local and regional governments planning to maintain the rural landscape in areas experiencing high levels of RT serve to underscore the importance of maintaining strict ALR boundaries. Beyond preserving agricultural land, the ALR helps to curb sprawl and create compact urban communities. The Agricultural Land Commission – those ultimately responsible for overseeing the approval of inclusion/exclusion applications – should take serious note of the pressures of RT in the South Okanagan and adopt a long-term view when considering changes to ALR boundaries. Although findings from the South Okanagan indicated the ALR remained a strong barrier to urban expansion, the proliferation of RTs already occupying land within the ALR should serve as a warning that constant attention is needed to maintain the rural landscape and agricultural base.

6.2 Recommendations for Further Research

The utility of this research could be enhanced with additional research endeavours. Potential areas of theoretical and empirical research are outlined below:

6.2.1 Theoretical Works

- Aspects of mobility complicate the definition of a second home owner, residential tourist, or amenity migrant. Are Sheller and Urry (2006) correct in arguing that human populations are becoming increasingly mobile? Is Stedman (2006) correct in his argument that a secondary home is a more permanent feature of modern life when compared to the several permanent residences a person is likely to occupy? An analysis of the mobility of residential tourists in several locations throughout British Columbia may provide additional theoretical and practical insights into these questions.
- The connection between semi-permanent and permanent forms of migration (e.g. residential tourism, amenity migration) and short-stay tourism are often disputed within academia (e.g. Keuntzel and Ramaswamy, 2006; Chipeniuk, 2004). Several researchers (e.g. Gill and Williams, 2006; Ness 2009) have argued these flows of migrants may be influenced by short-stay tourism. However, others (e.g. Chipeniuk, 2004) have argued tourism plays only a small causative role. Isolating and/or quantifying this connection could both further the discourse surrounding these phenomena and increase the awareness of local decision-makers concerning the impacts of RTs.
- Vague terminology, compounded by a lack of agreement, surrounds studies of semi-permanent and permanent migration. The term “amenity migrant,” for instance, encompasses secondary home owners, permanent quality-of-life migrants, and retirees. This research has argued RTs represent a sub-category of amenity migrants: secondary home-owners. However, other researchers (e.g. McWatters, 2009) view RTs as synonymous with amenity migrants, while amenity migration researchers (e.g. Moss) dismiss the validity of residential tourism entirely. Establishing clear parameters around these terms could help to focus future research and isolate more specific impacts.

6.2.2 Empirical Works

- This research primarily examined the role of RTs as identified by property tax assessment data. This method of identifying RTs was primarily chosen as a substitute to a more indepth survey of the population that could assess motivations for relocating in the South Okanagan. Time and budget constraints largely influenced this substitution. Due to the nature of property tax assessment data, the entirety of the residential tourist population was not captured as many may indicate their home in the South Okanagan is their primary residence, yet spend almost half the year outside the region. A more indepth survey may capture the impacts of these residents. Property tax assessment data can provide a starting point for such survey-based research.

- Although a large percentage of RTs in a compact urban area undoubtedly drives real estate prices upwards, exact measurements are lacking. Isolating the impacts RTs have on real estate prices is difficult, but worthwhile. Future research might attempt to quantify this impact.
- Further investigation on the implications of “contingent ALR expansion areas” is required. Such a process is unique to the Town of Osoyoos, but could be employed province-wide. Will the identification of contingent expansion areas become a common practice with the ALC? Are these practices more prevalent in areas with a high percentage of RTs? Does the existence of contingent expansion areas lessen the pressures on the ALR or only serve to erode the reserve and increase edge conflicts?
- A detailed GIS analysis of land use changes within the ALR over several years or even decades could provide useful illustrations of the impacts of RTs on agricultural practices. A larger scale analysis utilizing property assessment data and changes to the ALR may be useful. Cooperation with the ALC, including unrestricted access to their data, will be necessary for this research.
- The intensive nature of in-depth key informant interviews utilized in this research limited the number of respondents and yielded results highly specific to the case study area. Additional research combining interviews with sample-based survey methodologies may facilitate broader perspectives and allow for further generalisation of results.
- Local newspapers provide a rich source of content via “Letters to the Editor” sections. Debates on land use issues appear frequently in these sections. A content analysis of this information may provide useful insights into community acceptance of RT, tourism, and associated land use changes.
- This study was conducted during a time of global economic downturn. Consequently, many developments geared towards RTs were on hold. Respondents indicated this lull in development provided them with a unique opportunity to plan ahead. Future research might assess changes to the landscape after a steady period (e.g. 5-10 years) of economic growth.

Appendix A –Interview Guide

About the Participant:

Name:

Position/Title:

How would you like to be identified in this research?

Anonymously

By Title

By Name

If necessary, can I contact you again at a later date to confirm and/or follow-up on information as it pertains to this research?

Yes

No

- How long have you been a resident of the Okanagan-Similkameen?
- To what extent were you aware of residential tourism (or its synonyms: amenity migration; quality of life migration) and/or its effects before I contacted you?

Issue 1: About Residential Tourism's Pressures On Rural Landscapes landscape

1a. Guiding Question(s)

To what extent has residential tourism occurred throughout the South Okanagan?

- In your opinion, why do people move to the South Okanagan?
 - What role does the rural landscape play in attracting migrants?
 - What role does the rural landscape play in attracting tourists?
 - Is agriculture an important part of this rural landscape?
 - Is this landscape threatened by continued migration or second home purchases?

1b. Guiding Question(s)

How has residential tourism impacted agricultural land and the rural landscape in the South Okanagan?

1. There are many second homes throughout the rural areas (approximately 20-40% according to tax assessment data). From your perspective, how do these second homes impact:
 - a. Agriculture?
 - i. In terms of land-use?

- ii. In terms of conflicts between farmers and adjacent non-farmer residents?
 - b. Rural viewsapes? (i.e. the picturesque rural landscapes often used to promote tourism in the South Okanagan)
- 2. A number of second homes are considered 'estate residential' (i.e. large homes on large tracts of land, possibly farmland). How do these particular residences affect:
 - a. Agriculture?
 - i. In terms of land use?
 - ii. In terms of conflicts between farmers and adjacent non-farmer residents?
 - b. Rural viewsapes
- 3. Based upon current trends in second home growth, what will the South Okanagan's rural areas look like in (10, 25, 50) years in terms of:
 - a. Agriculture
 - b. Rural viewsapes

Issue 2: About current rural land-use planning policies

2. Guiding Questions

Are the pressures of residential tourism adequately addressed with existing policy (e.g. ALR, rural zoning, growth strategies, etc)? Are new policies and/or methods required to address these pressures?

1. To what extent are current planning tools used to manage residential tourism in rural areas? For example:
 - a. The regional growth strategy sets priorities to preserve agricultural land and provides a toolkit for local government to limit growth pressures on agricultural lands. How do these strategies address the pressures of residential tourism?
 - i. To what extent does the success of these strategies depend on town councils accepting the regional growth strategy?
 - b. Maintaining large lot sizes in rural areas is often used as a strategy to ensure farming remains viable and to discourage residential development. RH1 zoning can be as small as 0.4 ha while land zoned for agricultural usage (but not necessarily included in the ALR) can be as small as 4ha. To what extent are these zoning measures effective in managing residential tourism?
 - c. The RDOS (Regional District of Okanagan-Similkameen) currently uses development permit areas (DPAs) to preserve environmentally sensitive areas. Would the RDOS consider the use of DPAs to protect agricultural land or preserve rural character from residential tourism development? If yes, why?

2. The regional government is responsible for land use planning in the Okanagan-Similkameen's rural areas, while individual councils manage growth within town/city/municipal⁹ boundaries. To what extent is this model effective at managing growth driven by residential tourism?
 - a. In order to adequately manage residential tourism, to what extent should towns/cities/municipalities influence land use planning in rural areas?
3. In public information sessions held in regards to the regional growth strategy, the preservation of agricultural land base and rural character were top priorities identified. From your perspective, what unique challenges does residential tourism create in achieving these goals?
4. With a growing population, avoiding sprawl and embracing 'smart-growth' development principles (e.g. infill, brown-site redevelopment, compact development) is challenging. From your perspective, how has an increase in residential tourism affected this challenge and influenced rural land use patterns?
5. The Agricultural Land Reserve (ALR) prevents residential growth in many rural areas. From your perspective, how effective has the ALR been at limiting growth from residential tourism?
 - a. As of 2002, the ALC (Agricultural Land Commission) began operating at a regional level. Approximately 70% of the land removed from the ALR in the Okanagan-Similkameen occurred after 2002. From your perspective, how has an increase in residential tourism accelerated these changes?
 - b. In 2004 the notion of "community need" was introduced to allow the ALC to exclude land from the ALR for non-agricultural reasons. How has this change been used to obtain land for development primarily aimed towards residential tourists (e.g. vacation properties)? What are some examples?

Issue 3: About Leveraging Benefits from Residential Tourism

3a. Guiding Questions

How effectively are local governments leveraging benefits (economic, social, environmental) from residential tourists? How can an Agricultural Resort Area designation maximize the benefits we can leverage from residential tourists?

1. Compared to the average population, residential tourists are typically wealthier and better educated. From your perspective, what types of benefits do residential tourists bring:
 - a. Economic benefits? (e.g. higher spending power, new businesses)
 - b. Social benefits? (e.g. broader range of services, enhanced infrastructure)

⁹ Towns, cities, and municipalities are all present in the Okanagan-Similkameen and all face the same issues of jurisdictional separation of urban areas (in a town, city, or municipality) and rural areas.

- c. Environmental benefits? (e.g. increased awareness and/or sensitivity?)
2. Real estate development has been a growing business in the Okanagan for the past decade. Many developments are aimed at residential tourists. From your perspective, should the region encourage or discourage additional real estate development aimed at residential tourists? Why?
3. In desirable tourism areas, resort developments are common. For example, a 1700+ bed unit resort was proposed north of Oliver – a development that would likely promote residential tourism. This proposal was publicly supported by council members and representatives from the Ministry of Agriculture and Lands. What types effects might this type of development have on Oliver and the region?

3b. Guiding Questions

How can an Agricultural Resort Area designation maximize the benefits we can leverage from residential tourists?

4. To what extent did ODCEDS (Oliver and District Chamber and Economic Development Society) play a role in pursuing an agricultural resort area designation for Oliver? To what extent was the community supportive of this designation?
5. Promoting tourism and pursuing the designation of an 'agricultural resort area' has been a consistent goal of ODCEDS. From your perspective:
 - a. Will an agricultural resort area designation increase residential tourism developments?
 - b. Will an agricultural resort area designation help to preserve the agricultural landscape? If so, how? If not, why not?
6. Osoyoos' rural areas have a high percentage of residential tourists (i.e. second home owners). ODCEDS has stated that they wish to avoid this situation in Oliver. From your perspective, how would the creation of an agricultural resort area:
 - a. Affect tourism?
 - b. Influence residential tourism?
7. Oliver's agricultural area plan states that community is concerned with the changes an agricultural resort area designation may bring to Oliver
 - a. What are these changes? Why are they regarded with apprehension?
 - b. Is an increase in residential tourism one of these changes?
8. Becoming a resort area provides a community with a unique set of legislative tools including the ability to regulate the built form and character of the resort, levy development cost charges, and implement an additional hotel room tax. From your perspective:
 - a. How can resort legislation be utilized to leverage community benefits from residential tourists?

- b. How can resort legislation be used to manage growth in residential tourists?
9. ODCEDS has been working towards establishing a wine-themed village. As Oliver currently lacks appropriate accommodations, opportunities to collect revenue from the AHRT would be limited if the town received a resort designation.
- a. To what extent do the wine village and resort designation plans complement each other?
 - b. Together, how do these plans strengthen the benefits that might be leveraged from residential tourists?

The project is expected to be completed by January, 2010. Electronic copies of the research will be made available to you upon request.

This research has been approved by the Director, Office of Research Ethics, on behalf of the SFU Research Ethics Board in accordance with University policy R20.0, www.sfu.ca/policies/research/r20-01.htm.

Should you wish to obtain information about your rights as a participant in research, or about the responsibilities of researchers, or if you have any questions, concerns or complaints about the manner in which you were treated in this study, please contact the Director, Office of Research Ethics by email at hal_weinberg@sfu.ca or phone at 778-782-6593.

Appendix B –Respondent Solicitation and Project Description

Managing Residential Tourism in BC's South Okanagan

Dear Participant,

I am a graduate student working at Simon Fraser University's Centre for Tourism Policy and Research. We are involved in a province-wide investigation concerning how residential tourism shapes the development of rural communities. My specific research examines the effects of residential tourism in the Okanagan-Similkameen. I would appreciate speaking with you on this important topic. In particular, I would like to learn your perspectives on how residential tourism is affecting your region.

What is Residential Tourism?

As rural communities grow, residential developments aimed at semi-permanent residents commonly accompany this growth. Many of the owners of these properties purchase them for seasonal, recreational, and/or quality of life reasons. The owners of these properties are often referred to as residential tourists or amenity migrants. Importantly, these residents can play a key role in shaping the future development of the regions they inhabit. According to property tax assessment data, a significant portion of the residential properties in the Okanagan-Similkameen region are second homes or vacation homes owned by residential tourists

Your Perspectives Are Needed

As an informed resident of this region, would you be willing to speak with me about how residential tourism is shaping your region? I am currently staying in the Okanagan while conducting interviews with other informed residents. Ideally, I would like to meet with you between June 24 and July 21st. Depending on the information you are able to share, my interview with you should take about 30-45 minutes to complete.

Would you kindly let me know (by email or telephone) if you might be available to help by participating in an interview? I can then contact you directly to determine a mutually convenient time to meet.

Thank you for your time,

Stu Johnson
Master's Candidate
Centre for Tourism Policy Research
School of Resource and Environmental Management
Simon Fraser University
Office: TASC1 8412
604-765-6950

The project is expected to be completed by January, 2010. Electronic copies of the research will be made available to you upon request.

This research has been approved by the Director, Office of Research Ethics, on behalf of the SFU Research Ethics Board in accordance with University policy R20.0, www.sfu.ca/policies/research/r20-01.htm. Should you wish to obtain information about your rights as a participant in research, or about the responsibilities of researchers, or if you have any questions, concerns or complaints about the manner in which you were treated in this study, please contact the Director, Office of Research Ethics by email at hal_weinberg@sfu.ca or phone at 778-782-6593.

Appendix C – Consent Form

Interview Consent Form

Research Project: The Effects of Residential Tourism on the Okanagan-Similkameen Valley
Investigator: Stuart Johnson, Master's Candidate, School of Resource and Environmental Management
This research is being conducted under permission of the Simon Fraser Research Ethics Board.
The chief concern of the Board is for the health, safety and psychological wellbeing of research participants.

Your signature on this form will signify that you have received a document which describes the procedures, whether there are possible risks, and benefits of this research study, that you have received an adequate opportunity to consider the information in the documents describing the study, and that you voluntarily agree to participate in the study.

Purpose and goal of this study: This proposed project is part of a larger research program at Simon Fraser University's Centre for Tourism Policy and Research. My specific research examines the effects of residential tourism in the Okanagan-Similkameen in three stages. The first stage explores the extent to which residential tourism has affected the rural landscape. The second stage assesses the effectiveness of current land-use planning policies in managing the effects of residential tourism. The final stage examines how small communities can pro-actively plan to leverage benefits from residential tourism.

Participant Rights: Should you wish to obtain information about your rights as a participant in research, or about the responsibilities of researchers, or if you have any questions, concerns or complaints about the manner in which you were treated in this study, please contact the Director, Office of Research Ethics by email at hweinber@sfu.ca or phone at 778-782-6593.

Participant Requirements: The participants will be required to participate in an active interview that involves open questions concerning the effects of residential tourism. Interviews will be conducted in person. If circumstances require, interviews may be conducted via telephone.

Risks to the participant, third parties or society: The risks of this study are minimal. Participant identities will be kept confidential, participants may decline to answer any question, and participants may withdraw from the study at any time.

Benefits of study to the development of new knowledge: As relationships between tourism and migration have only recently received academic attention, it is fundamental to the sustainability of amenity-rich destination communities to develop an understanding of local planning and management responses to this phenomenon. It is hoped that the lessons learned from this exploration will increase community stakeholders and public decision makers' awareness of the pressures and opportunities that residential tourists bring to destination communities.

Statement of confidentiality: Your signature on this form will signify that you have received information, which describes the procedures, possible risks, and benefits of this research study, that you have received an adequate opportunity to consider the information in documents describing the study, and that you voluntarily agree to participate in the study. Any information that is obtained during this study will be kept confidential to the full extent permitted by the law. Unless your consent is explicitly requested and granted, no specific names, titles, or identifiers will be used in the final report that would allow readers to attribute a reference to a particular person. With your permission the interview will be recorded and materials will be maintained in a secure location.

Interview of employees about their company or agency: The interview is voluntary in nature. Consent will not be obtained from the participants' employers, agencies or other organizations with which they are affiliated.

Contact of participants at a future time or use of the data in other studies: Please state whether or not you can be contacted again at a future time to obtain further information pertaining to this research as necessary. The data obtained from this research will not be used in other studies.

Data Security: Following each key informant interview, notes and/or recordings will be transcribed by the primary investigator (Stuart Johnson) onto a computer and stored electronically on a USB memory stick in possession of the primary investigator (Stuart Johnson). Transcriptions will be held until September 2011, after which they will be destroyed.

Right to withdraw: I understand that I may withdraw my participation at any time. I also understand that I may register any complaint with the Director of the Office of Research Ethics at address below:

Dr. Hal Weinberg
Director, Office of Research Ethics
Office of Research Ethics
Simon Fraser University
8888 University Drive
Multi-Tenant Facility
Burnaby, BC V5A 1S6
hal_weinberg@sfu.ca

Copies of the results from this study may be obtained by contacting: Stuart Johnson (sja9@sfu.ca), or Dr. Peter Williams (peter_williams@sfu.ca).

I have been fully informed of the objectives of the project being conducted. I understand these objectives and consent to being interviewed for the project. I understand that steps will be undertaken to ensure that what I say in this interview will not be linked to my identity and will be kept confidential upon completion of the study. I understand that, if I wish to withdraw from the study, I may do so without any repercussions.

I also understand that I can address any concerns or complaints about this research to Dr. Hal Weinberg, Director, Office of Research Ethics at: hal_weinberg@sfu.ca or 778-782-6593.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this study.

- ☐ YES
☐ NO

With full knowledge of all foregoing, I agree, of my own free will, to allow audio from this interview to be electronically recorded.

- ☐ YES
☐ NO

Participant Name: _____ (Please Print)

Participant Signature: _____

Witness Signature: _____

Date: _____

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