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Amenity Migration to Mountain Regions: Current Knowledge and Strategic Construct for Sustainable Management

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Amenity Migration to Mountain Regions: Current Knowledge and a Strategic Construct for Sustainable Management

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Abstract

Amenity migration has become an important force for change in non-metropolitan high amenity places around the world. Here the focus is on these places in mountain regions that attract permanent and part-time residents because of their comparatively rich concentrations of Earth's remaining natural environment and differentiated culture. Drawing on their own and others' research and related community development experience, amenity migration, and its dependent economic migration, is identified and their socio-cultural, economic and biophysical effects are described. Although this migration has brought benefits to mountain regions, with exceptions, its characteristic result to date has been a degrading of mountain ecologies along with a complex mixture of positive and negative socio-cultural and economic outcomes. The public, private and volunteer sectors responses to this phenomenon are outlined, and the authors go on to suggest that the benefits of amenity migration could be greater, if this phenomenon was much better understood and managed for ecological sustainability. At the same time, its present negative effects could be reduced or reversed. Strategic analysis, a methodology that was instrumental in formulating the amenity migration construct described here, is explained and this framework and analytical method is proposed for managing amenity migration in mountain regions. The paper also discusses amenity migration in economically developing countries and its relationship to indigenous peoples. However, the very little information available to date on these two subjects has handicapped this objective. In closing the authors suggest research priorities for amenity migration in mountain regions.

***Key Words**: amenity migration, economic migrants, indigenous peoples, strategic analysis, economically developing countries (EDCs)*

The Amenity Migration Phenomenon

People are moving to mountain regions in increasing numbers as both residents and sojourners. This dynamic is most apparent in North America and Western Europe, but is also a significant aspect of contemporary global change in mountainous areas around the world, such as in Argentina, Australia, Costa Rica, Czech Republic, India, New Zealand, Philippines and South Africa (Moss, Ch. 1, 2006). Globally, environmental and cultural amenities of mountain regions are under increasing pressure from amenity migrants and tourists. Moreover, the most likely future scenario indicates continued growth of this force and the characteristic degrading change that it has brought to mountain ecosystems and their symbiotic human communities. In addition there are the negative knock-on effects for lowlands, which depend on ecological services of the mountains above. This is the probable condition if we do not substantially improve our understanding of this phenomenon and our capability and determination to manage it in a sustainable manner (Moss, 1994, Chs. 1 and 21, 2006; Glorioso, 1999, 2006).

To date knowledge about human movement to mountain regions and action to manage it has focused on tourism. But, amenity migration is now an equal or greater societal force — one we know much less about, and also one often being confused with tourism. By 'amenity migration' we are referring to the movement of people to places, permanently or part time, principally because of the actual or perceived higher environmental quality and/ or cultural differentiation of the destination (Moss, 1994, 2006; Price *et al.,* 1997). Others who locate primarily for economic gain from amenity migration and tourism we refer to as 'economic migrants' (Moss, 1994; Glorioso, 1999), and the term 'amenity-led migrant' has been suggested when considering both amenity migrants and economic migrants (Moss, Ch. 1, 2006).

In this paper we focus on this type of migration to mountain regions in particular because of their comparatively high concentrations of Earth's remaining environmental quality and cultural distinctiveness, and the opportunities and threats of amenity migration to sustaining the fragile ecologies of mountain zones and their human communities. These amenity seekers are also moving to other places, notably those with relatively unspoiled and still accessible sea coasts and lakes, in both economically developing countries (EDCs), such as Brazil, Croatia, India, Thailand, and more remote areas of wealthy nations. The best comparative information about movement to alternative high amenity destinations is for the USA (especially Deller *et al.,* 2005).

Both the general information about amenity migration and its specific mountain manifestation has been increasing over the past few years (especially Hall and Williams, 2002; Hall and Müller, 2004; Green *et al.,* 2005; Clark *et al.*, 2006; Kandel and Brown, 2006; Moss, 2006). This is particularly the case with the inclusion of the literature on second homes, which focuses on the part-time or intermittent amenity migrants. Most publications to date are about amenity migration in wealthy countries. We know of only fourteen publications that focus on this phenomenon in EDCs (mostly in mountain regions), which are identified here for this journal's readers: Argentina (Otero *et al.,* 2006); Caribbean Islands and Rocky Mountains, USA (Lorah, 2006); China (Ma and Chow, 2006); Chile (Romero and Ordenes, 2004; Romero, 2006); Costa Rica (Chaverri, 2006); Mexico and Panama (Dixon *et al.,* 2006); Philippines (Dimaculangan, 1993; Moss and Glorioso, 1999; Glorioso, 2001, 2006); South Africa (Hoogendoorn and Visser, 2004; Visser, 2004); and Zimbabwe (Tonderayi, 1999). To this may be added publications about amenity migration in the transitioning former soviet block, all on the Czech Republic (Glorioso, 1999; Bičik *et al.,* 2001; Vágner and Fialová, 2004; Bartoš *et al.,* 2005). Undoubtedly there is also unpublished information, such as the materials we have on high amenity places in China, Laos, Thailand and Viet Nam. Even when we include other publications with some aspects of amenity migration as part of related themes of change and development in poorer countries, such as parks management or tourism development, the sum of this knowledge remains unfortunately quite limited, especially given their richness in distinctive and diverse culture, in addition to natural amenities.

Effects of Amenity Migration on Mountain Regions

Like the amenity migration phenomenon itself, its effects are systemic and complex. Therefore, the following division of these effects into socio-cultural, economic and biophysical while helpful to this discourse is somewhat artificial. In addition, we have added a separate section here on amenity migration and indigenous peoples or First Nations, as the related information is still too limited to treat thematically throughout the paper.

Socio-Cultural Effects

Compared with information about the biophysical and economic aspects, including effects, of mountain amenity migration (see below), especially biophysical, much less is known about its socio-cultural aspects, with the exception of demographic characteristics that lend themselves well to quantitative analysis. While their research has resulted in significant knowledge, the heavy focus to date of academics studying amenity migration effects on biophysical attributes of place, and the relative ease of applying statistical techniques in this realm, has added little to the limited information about the phenomenon's socio-cultural consequences (Moss, Ch. 1, 2006; Nelson, 2006; Saint Onge *et al.,* 2006). Relying mainly on qualitative methods in the context of strategic analysis (see below: *Strategic Analysis: A More Effective Means)* has allowed us to study amenity migration and its effects more holistically. From this research cultural amenities were found to be a primary motivator along with natural amenities, with the former being of equal or greater attraction than the latter for many amenity migrants. This approach also resulted in significant knowledge about amenity migration's socio-cultural effects. The sum of others' findings, along with ours, in the socio-cultural area indicates that amenity migration has brought about complex socio-cultural change and creates significant societal issues and dilemmas in mountain communities (Dimaculangan, 1993; Moss, 1994, 2006; Glorioso, 1999; Jobes, 2000; Green *et al.,* 2005; Billy, 2006; Chaverri, 2006; Clark *et al.,* 2006; Flognfeldt, 2006; Glorioso and Moss, 2006; Krannich *et al.,* 2006; McMillan, 2006; Nelson, 2006; Otero *et al.,* 2006; Perlik, 2006; Thompson, 2006).

A socio-cultural profile of amenity migrants and their associated effects may be generally characterized as follows. Amenity migrants usually come from metropolises and typically bring with them, and maintain, values and behavioural traits different from where they settle. They have higher formal education and frequently, greater discretionary wealth than earlier inhabitants. Especially the wealthier tend to congregate, which can strengthen their local socio-economic and political influence. In general these amenity seekers tend to upset old rhythms, stress and change often more traditional local values, norms and behaviour. This change is commonly reported as unwanted by many locals, as well as by some amenity migrants, who most often articulate this concern as a 'loss of community' or 'diminishing quality of life'. This includes their familiar 'place' being dramatically remade to appeal to amenity migrants', and tourists', image of an idyllic Alpine village, which frequently results in a cultural and physical Disneyland. However, other locals welcome these changes along with the new ideas, world views and capital of amenity migrants.

Commonly, this change is accompanied by a perceived or real loss of local control. One manifestation is the reduced ability of earlier inhabitants to reside within their community, due to increased taxes, rent and property commercial values and ownership by 'outsiders'. A characteristic outcome is restriction or displacement from preferred or essential access to social networks, livelihood and recreation. More generally, the considerable cost of living increase that has usually accompanied amenity migration is a stressor for earlier inhabitants and some in-comers, and tends to segregate society. Tension and conflict between locals and amenity migrants is frequently reported in our own and others' research (Moss, 1994, Ch. 1, 2006; Duane, 1999; Glorioso, 1999, 2006; Jobes, 2000; Glorioso and Moss, 2006; Krannich *et al.,* 2006; Lynch, 2006; Moore *et al.,* 2006; Otero *et al.,* 2006; Perlik, 2006; Thompson, 2006). Poverty, housing, land conversion and other social equity issues in high amenity places, most pronounced in poorer countries, is beginning to be a significant research focus (Jobes, 2000; Matthews, 2004; Billy, 2006; Clark, 2006; Glorioso, 2006; Glorioso and Moss, 2006; Golding and Van Auken, 2006; Moore *et al.,* 2006; Moss, Ch. 1, 2006).

Detrimental socio-cultural effects appear heightened by the impermanence of much amenity migration; both temporal and psychological. To a considerable extent this is caused by high numbers of part time residents and their intermittency, along with the impermanence of even the 'permanent residents' — amenity residents who did not find what they wanted or thought they wanted, could not make it financially, or felt the urge to seek greener pastures, especially after the present one is degraded, which may have been due to their own behaviour. Of comparable or greater importance to their physical presence are the amenity migrants' feeling of belonging or attachment and their related local social ties and participation in community affairs. While greater physical presence suggests corresponding local interaction and commitment to protecting local amenities, this is not necessarily so (Moss, Ch. 1, 2006). Brehm *et al.,* (2004) in their comparative study of 'new comers' and long–term residents of the amenity-rich US rural West concluded that the length of residence is not a determining factor with respect to levels of attachment to the natural environment. However, their measures of natural environment were focused on aesthetic and recreation-related aspects. They suggested that it might be useful to study residents' spiritual or emotional attachment to the natural environment, which we referred in our mountain region specific studies as 'local attachment' or 'feeling of belonging'. Our findings suggested that many amenity migrants, intermittent, seasonal or permanent, and especially the wealthy, often have little or no local attachment. Or if they formed attachment, that for their earlier or principal home is deeper (Moss, Ch. 1, 2006).

The above also appears true for foreign amenity migrants (Glorioso, 1999; Gustafson, 2001), a particular concern for high amenity places in less wealthy nations attracting significant numbers of foreign amenity seekers. Generally these residents appear disinclined or find it difficult to form local community attachment and become involved. Very many do not consider their residence as permanent. Referring to her Šumava, Czech Republic studies, Glorioso (1999), and Dixon *et al.,* (2006) to their Mexico and Panama research, stated that a foreign language is a primary challenge or barrier to establishing local relationships. Yet, foreign amenity migrants have played key roles in both environmental protection and economic development in EDC high amenity places (Dimaculangan, 1993; Moss, 1994; Chaverri, 2006; Dixon *et al.*, 2006; Glorioso, 2001, 2006).

Economic Effects

Amenity migrants have brought and created new and more diversified economic activity in mountain regions. In the western states of the USA "This combination of amenity-based migration and a new economic base has created what some call a 'New West'" (Nelson, 2006: 58). Included is self-employment and some jobs for others, an especially significant development in places that have experienced diminishing forestry or mining, such as in western Canada and USA. Parallel, there is indication that amenity migration may reduce some out-migration of earlier inhabitants. However, amenity migrants may or may not be engaged in earning a living in their high-amenity location. A considerable percentage of them obtain income from elsewhere in the form of investment returns or transfer payments. When earning an income locally, they are plugged into the information-based 'New Economy', but also many have more mundane jobs, such as construction workers, clerks and restaurant waiters and often have several part time jobs. Characteristically the amenity-led migrants derive income from tourism and amenity migration service activities, the primary driver typically being real property development. They own the enterprise or occupy the higher paying jobs in the late modern sector of the economy, along with the professional positions of other activities, as they have the appropriate knowledge and orientation, and enabling capital (Moss, 1994, 2006; Johnson and Rasker, 1995; Rasker and Alexander, 1997, 2003; Johnson *et al.,* 2003; Green *et al.,* 2005; Chipeniuk, 2006; Clark *et al.*, 2006; Löffler and Steinicke, 2006).

Overshadowed by attention to the wealthier in-comers, especially in the academic literature about contemporary economic activity in high amenity places, are the many of modest means (Chipeniuk, 2006; Moss, Ch.1, 2006; Otero *et al.,* 2006). Two noted, not mutually exclusive groups are young adults with children and 'step-downs', people who appreciably reduced their income in order to reside in their chosen special place. A considerable number of these are among people who must subsequently leave due to the local increasing cost of living and a lack of adequate and appropriate income opportunities. An observation of more than a decade ago generally still appears to hold: "Already a mismatch between the skills of local people and the new employment in these places is evident, except in the case of more menial tasks" (Moss, 1994: 126). Social equity issues associated with these economic effects were noted above in *Socio-cultural Effects.*

Biophysical Effects

Particularly in the mountain context of comparative scarcity, poverty and ecological fragility (Messerli and Ives, 1997; Huber *et al.,* 2005) amenity migrants significantly increase and intensify the use of natural amenities, and to date this use cannot be characterized as sustainable. Especially in comparison to local people, these new residents typically consume more of everything; most critically, land, water and energy. The role of these migrants in land use and landscape change is pronounced in both magnitude and pattern. Land use of especially the wealthier migrants, is characteristically extensive and excessive. They typically increase the market price of land, often extremely, due to their superior personal and corporate access to capital and speculation, and in addition because of the scarcity of land resulting from the nature of mountain terrain and extensive public land ownership. This consumption has shifted land from watershed, forest, agriculture, ranch and wild lands to human habitation. In the mountainous state of Colorado, USA for example, every year between 1987 and 1997 57,100 ha of agricultural land was converted to residential and commercial development. Further, between 1992 and 1997 109,300 ha per year were converted, nearly double the ten year average (Obermann *et al.,* 2000). The new use is principally for amenity migrants' housing and tourist accommodation along with support infrastructure, including roads, waste management, energy systems, and recreation and shopping facilities, too frequently constructed to wasteful and otherwise inappropriate, flatland suburban settlement standards (especially Price *et al.,* 1997; Clark *et al.,* 2006; Moss, 2006). There are several observations that suggest this condition may be exacerbated in lower income countries, such as Czech Republic, Philippines and Thailand, where foreign amenity migrants with superior purchasing power to local inhabitants buy large amounts of land, principally because of their greater wealth and its base in stronger currencies (Callen *et al.,* 1993; Glorioso, 1999, 2006).

In this process human settlement has commonly sprawled across valleys and onto mountain slopes, compromising or destroying landscape beauty and fragmenting open space and wildlife habitat.

Notably this change includes considerable impermeable surfacing of the land. In sum the result is frequently soil, water, air and noise pollution. As recreation is typically central to mountain amenity migrants' location, they spend considerable time in active use of their surrounding natural environment. Commonly this is public land, especially parks and protected areas, which increases their use and pressure on their ecological processes (Power, 1996; Howe *et al.,* 1997; Glick and Alexander, 2000; Gobster and Haight, 2004; Dearien *et al.,* 2005; UNESCO-MAB, 2005; Moss, Ch. 1, 2006). Exceptions to the above pattern exist, particularly in Western Europe (see below: *Common Responses to Amenity-led Migration*; Clark *et al.,* 2006; Moss, 2006).

Amenity migrants may be arrayed along an environmental concern spectrum from being generally aware to committed activism. Early in our related research we hypothesized that as these in-migrants having a stake in their chosen place of residence, and commonly having moved there principally because of its environmental quality, they would therefore be quite active in protecting their natural environment. This appears typically not the case. In general their behaviour falls into two categories: resource-consumers and resource-conservers, and to date the former seem to dominate. Yet, there are many examples of resource-conserving amenity migrants, some of whom lead their adopted communities in related activity (Moss, 1994, 2006; Glorioso, 1999, 2006; Clark *et al.,* 2006). In her amenity migration research in Baguio, Philippines and Šumava, Czech Republic, Glorioso (1999, 2001, 2006) found that amenity migrants motivated mainly by learning, and especially spirituality, exhibited strong resource-conserving values and behaviour, and were usually the type actively protecting the natural environment. However, evidence from mountain regions in Philippines and Costa Rica, and our observations, such as in Indonesia, Laos, Slovak Republic and Viet Nam, indicated follow-on from understanding to improved protection and sustainable use is crippled particularly by poverty and social inequity (Chaverri, 2006; Glorioso, 2006).

More generally, there are suggestions that an amenity-based economy is a less, perhaps a much less damaging alternative to one based on natural resources extraction (Moss, 1994; Power, 1995; Moskowitz, 1999; Johnson, 2005). This may be so, or appears so against the extractive industries' history of degradation of the natural environment. However, this view is premature, given the negative effects of amenity migration outlined above, and unless they can be substantially mitigated or reversed. The superior future scenario for mountain regions is one of diversified economic activities being managed in an integrated manner for sustainable ecological integrity.

Economic Migrants

Amenity migration and its promoters are in part responsible for what may be a cause of even greater negative environmental effect, and perhaps stressful cultural change. The perceived, actual and potential growth and development of amenity migration, along with that of tourism, attracts many others, from well-capitalized land developers to unemployed labourers, primarily motivated by obtaining economic gain from this growth. These 'economic migrants' can markedly increase pressure on mountain ecologies and existing human settlements. The impact of the poor economic migrant appears most pronounced in the mountains of the EDCs, such as the Philippine Baguio bioregion. There the large number of the less fortunate searching for income and shelter, have taken over land, contributing considerably to extensive deforestation, hillside erosion, water shortage and pollution, and an increase in social problems (Glorioso, 2001, 2006). Such a condition appears generally compounded in the temperate mountains of tropical zones where many seek relief from lowland heat. This suggests a larger question: are others migrating or likely to migrate to the mountains, or what are the other reasons for people going to live and work in mountain regions, such as the threats of climate change for inhabitants of coastal regions (Glorioso, 2006; Moss, Ch. 21, 2006)?

Indigenous Peoples and the Amenity Seekers

The little information we have about indigenous or First Nation peoples and mountain amenity migration indicates that the cultures of these peoples are an important motivator for this type of migration. In the Santa Fe, New Mexico study most informants ranked the living and material culture of the bioregion's American Indians first among attractors of amenity migrants to this special place (Moss, 1994,

Ch.1, 2006). Some key informants in the Santa Fe, Baguio and Chiang Mai bioregions also stated that these peoples were not adequately compensated for this contribution (Callen *et al*, 1993; Glorioso, 2001, 2006). These three studies, along with the one about Skwelkwekwelt, BC (Billy, 2006), also indicated that First Nations control over their land and natural resources were threatened or lost in part due to amenity-led migration. In addition the Baguio and Skwelkwekwelt research indicated that First Nations as a group have benefit little from employment being generated by amenity-led migration in their traditional lands. They typically lost out to both amenity migrants and economic migrants because of real or perceived inadequate skills and education, as well as prejudice against indigenous peoples. Fortunately for some First Nations, especially in the USA, income from the recent development of their gaming and resort industry has brought with it some increase in political empowerment, self-determination and socio-economic welfare.

In 'Indian Country' USA, there is a growing concern about the amenity migration phenomenon, due to the above reasons and more generally its sprawling consumption of land and water, and also the cultural change that it typically brings. At the same time, amenity migrants are potential customers for First Nations' gaming, golfing and skiing enterprises, along with their more traditional cultural ones, such as the popular Eight Northern Indian Pueblo Arts and Crafts Market (Glorioso and Moss, 2006). The Ohkay Owingeh Nation of northern New Mexico, USA, has formulated a strategy to sustain its cultural and natural heritage that specifically identified amenity migration as a key factor in their strategic environment (Agoyo and Moss, 2006). In the Bulkley Valley, north-western British Columbia, Canada, First Nations officials of the Wet'suwet'en and Gitxsan peoples have joined with municipal mayors and other local and regional officers in a collaborative undertaking to develop a planning capability to help obtain appropriate amenity migration for the Valley (Chipeniuk, 2006).

Managing Amenity-led Migration

Response to Amenity Migration's Effects

The general response of the in-migrants to their own effects on mountain ecosystems was outlined above. Government (local, regional and national) in general has not addressed amenity-led migration due to lack of understanding of it and its inability and/ or unwillingness to manage its effects. As Beuret and Kovacshazy (2005) point out, public authorities view an environment or amenities as problems for which policies are designed essentially in reaction to threats and conflicts or to prevent risk. Where further constrained by a societal anti-planning ethic, 'corporatization of place' (Rothman, 1998) and local poverty, public land use planning and growth management ratifies rather than guides growth. In general there is public confusion between growth and development with both typically the result of default not design (Moss, 1994, Ch. 1, 2006). This condition is compounded by the difficulty local jurisdictions, especially unincorporated communities, have in controlling the impacts of the considerable capital that has flowed into them. Particularly evident in the US *New West*, is a lack of regional perspective and adequate authority, especially with an eco-systemic framework, which is essential for strategically managing amenity-led migration's effects, both positive and negative (Moss *et al.,* 1999; Gill and Clark, 2006; Moss, Chs. 1 and 21, 2006). The US Forest Service is one public entity that has clearly identified amenity migration as important and is sponsoring the development of related information and management tools for mountains and elsewhere (e.g. McGranahan, 1999; Stewart, 2002; Garber-Yonts, 2004; Gobster and Haight, 2004; Kruger, 2006).

Systemically linked with, or leading the public sector is a private sector that is typically focused within a short-term horizon on personal and corporate profit from promoting and accommodating amenity migration, particularly grounded in real estate and resort development (Jobes, 2000; Chaverri, 2006; Clark *et al.*, 2006; Moss, Ch. 1, 2006; Otero *et al.,* 2006). There is however analysis showing long-term, and especially natural amenities sustaining corporate behaviour (Gill and Williams, 2006). Some volunteer organizations focused on protecting and sustaining natural environment, wildlife and local community have begun to factor into their activities amenity-led migration *per se*, understanding its importance to achieving their objectives. Four of these we are particularly familiar with are: Canadian Parks and Wilderness Society (Canada), Chinook Institute for Community Stewardship (Canada),

National Parks Conservation Society (USA) and Yellowstone to Yukon Conservation Initiative (Canada and USA). The greatest constraint to the positive impacts of such organizations is their slim financial resources.

In the EDCs context, the authors have observed that foreign amenity migrants often playing significant positive roles in volunteer organizations, but typically are involved in environmental, not socio-economic issues. This may reflect the more general condition in which amenity migrants seem attracted by environmental amenities. When cultural amenities, especially living culture, is the primary motivator, we found this type of amenity migrant to be most interested in learning and spiritual development, and involved in seeking solutions to social-economic problems, especially those of indigenous peoples. This was the case in the Baguio, Philippines and Chiang Mai, Thailand and northern New Mexico, USA bioregions. However, they were few compared to the amenity migrants otherwise motivated by leisure.

The exceptions to the above general condition of very little action to address the challenge of amenity migration *per se* in mountain regions in the Americas were identified especially in the California Sierra Nevada, USA the Bulkley Valley of BC, Canada, and more partially elsewhere (Moss, 1999, Ch. 1, 2006; Chipeniuk, 2006; see discussion on public planning tools below). In comparison, the Western European general pattern appears to be significantly better control of the negative effects on the mountain natural environment in particular through management of urban growth and protected areas (Flognfeldt, 2006; Löffler and Steinicke, 2006; Moss, Ch. 1, 2006; Perlik, 2006). Given the very limited knowledge about amenity migration elsewhere, it is premature to characterize its management.

An Amenity Migration Construct

Many decision makers, planners and researchers are aware of, and are attempting to understand and manage the impacts of amenity migrants, also referred to as *settled tourists* and *resident tourists,* and more colloquially as *flexecutives, modem cowboys, trustafarians* (Caribbean Islands' usage), etc. But typically their policy and action is piece meal and ad hoc (see below). There are a number of partial and more complete explanations of who these migrants are and why they are moving; most treating the subject generally, without a focus on a specific ecology. The most relevant publications are probably: Power, 1995; Johnson and Rasker, 1995; Howe *et al.,* 1997; Jobes, 2000: Williams and McIntyre, 2001; Green *et al.,* 2005; Clark *et al.,* 2006; Kandel and Brown, 2006; and Moss, 2006. The amenity migration construct described here not only explains amenity migration in mountain regions, but also offers a more strategic context and approach for managing it.

The initial construct was an outcome of a strategic planning project of the Government of Alberta, Dept. of Economic Development & Trade (1985-86), in which global alternative future scenarios identified among a set of key factors two of particular importance to our subject here. One was clear affirmation that a significant shift was occurring in the perception and use of 'natural resources' — from being extracted and shipped out to being of likely greater social and economic value *in situ.* Landscapes, their mountains, forests and waters, were increasingly being sought as leisure, learning (including spiritual) and more general living experience, and as such, generate contentment and income. The second was distinctive cultural manifestations of local peoples, particularly their living culture, were becoming increasingly an asset of *place.* Deciding to further explore these findings, small towns similar to those in Alberta, with high environmental quality and/or distinctive cultural attributes, and negligible manufacturing activity, were identified. A large number were in mountain regions and from these Santa Fe, New Mexico was chosen for further study. It was expected that tourism was the main reason for its success, particularly economic success. Using strategic analysis (see below) it was however quickly apparent that something else quite significant was going on; similar to tourism, yet different. People were moving to the Santa Fe bioregion particularly to enjoy its considerable environmental quality and cultural distinctiveness. Moss called this phenomenon 'amenity migration' (1986).

Subsequently, analyses of this phenomenon were undertaken in a number of high amenity places intermittently by Moss between 1987 and 1992 and by both authors from 1993 to 2006. Four qualitative techniques were used for information gathering: key informants and experts interviewing, participant observation, primary sources content analysis and visual anthropology. In the latter two activities we

focused on publications and reports on growth and development, including tourism, in peri-urban and more rural communities and regions, especially in mountain areas. Strategic analysis was then used for identifying structural relationships in the information obtained. This work included longitudinal studies of Santa Fe, New Mexico, USA; the Baguio bioregion, Philippines; and the Šumava bioregion, Czech Republic; and a one-time survey in Chiang Mai, Thailand. Usually using key informant interviewing and secondary sources, the following places were also studied: Luang Prabang, Laos; the Sierra Nevada bioregion of California, Sunriver, Oregon, Aspen, Cortez and Vail, Colorado, USA; and the Okanagan Valley, Rossland and Whistler BC, Canada. Also, the experience of several colleagues and ourselves participating in local community planning and action to manage amenity migration related change was important, particularly this experience in Baguio, Philippines; Český Krumlov, Czech Republic; Cortez, Colorado, Sunriver, Oregon and La Cienega, Ohkay Owingeh, the Pojoaque Valley and Santa Fe, New Mexico, USA. Most recently the construct was further developed from the information obtained in editing a volume on global mountain amenity migration, *The Amenity Migrants: Seeking and Sustaining Mountains and their Cultures* (Moss, 2006).

Tourists usually visit without the intention to reside or earn a living in their destinations. Amenity migrants however settle in their destinations, where they reside permanently, seasonally or intermittently. The first type reside most of their time in the high-amenity place; seasonal ones reside there for one or more periods in a year, such as for the summer, the ski season or the opera season, and the intermittent type move among their residences more frequently. Others have defined the amenity migrant differently. For example Chipeniuk (2006) and Buckley *et al.*, (2006) consider only those who move 'permanently' to be amenity migrants.

From our study of amenity migration a pattern appears to have emerged in which the phenomenon is being driven by a coalescence of sets of motivators and facilitators. There are two meta-motivators of the phenomenon: higher societal valuing of the natural environment and differentiated culture, and nested within these, the motivators of leisure, learning (including spirituality), economic gain and flight from the negative conditions of large cities. It should be noted that the economic gain referred to here is not a primary motivator (see above: *Economic Migrants*). Facilitating this late-modern migration is a marked improvement in discretionary time, discretionary wealth, access-facilitating technology, and destination comfort amenities (see Figure 1; Glorioso, 2006; Moss, Ch.1, 2006). While this model was formulated for amenity migration to mountain regions, it also seems to explain the more general phenomenon.

During the past five years of further studying amenity migration it has become more evident that the comparative significance of these key motivators and facilitators vary not only with specific place, but also through time. Discretionary time, for example, is perhaps not as generally important today as when it was earlier identified. This is likely the result of the 'New Economy' not generating as much leisure as was earlier expected (Glorioso, 1999, 2006), along with the ability of amenity migrants to travel more frequently and swiftly to and from their mountain homes (Glass, 2006; Flognfeldt, 2006; Moss, Ch. 1, 2006; Perlik, 2006). Another example is the indication that along with an increasing numbers of people moving to mountain regions, profit, particularly from corporate and personal real estate development, has been a growing motivator for others to move part and full time to the mountains. As noted earlier, an irony of increased environmental awareness in a consumption-driven free-market society is the commoditization of the environment, so that demand for a piece of the pie is chopping much of it into one to ten-acre fenced lots (Moss, 1994). At the same time the price of a piece of pie has been rapidly increasing, in prime locations with exponential force. This and other increasing costs of living appears to be decreasing access to high amenity places, except for the wealthy and the very wealthy (Heimlich and Anderson, 2001; Matthews, 2004; Graff, 2005; Glorioso and Moss, 2006; Löffler and Steinicke, 2006; Moss, Ch. 1, 2006).

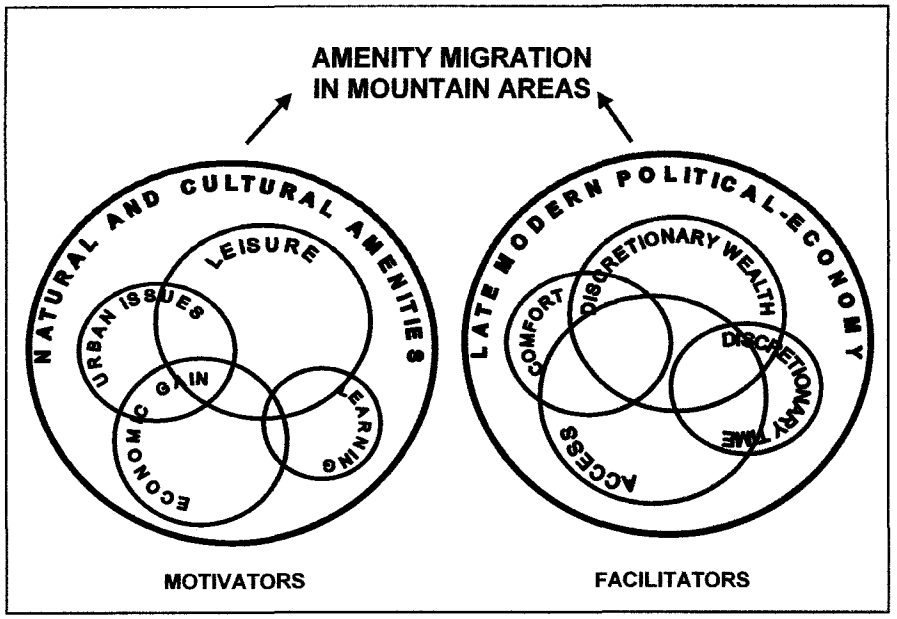

Fig. 1 Amenity migration construct showing overlapping relationships and comparative significance of key motivators and facilitators in 2005 (Moss, 2006:11).

Strategic Analysis: A More Effective Means

Strategic analysis has been instrumental in our identifying and explaining amenity migration and its effects, and in formulating and undertaking related community studies, planning and action. This methodology is derived from strategic planning and has the following principal attributes. It provides an appropriate framework and approach for studying and managing complex and uncertain systems or phenomenon, ones more successfully treated in a holistic manner, principally through the identifying and understanding of behavioural patterns of open systems. Strategic analysis is relativistic or situational, and therefore focuses on understanding and manipulating only key factors, and in this sense is not comprehensive (Glorioso and Moss, 1994, 2006; Moss *et al.,* 1999).

It is also distinguished from other analytical methods by the structured inclusion of key factors (socio-cultural, economic, political, technological and environmental) that may seem external to the phenomenon or system being considered, but of likely primary significance to achieving a mission or objective. This component of the methodology is referred to as the 'external' or 'environmental analysis'. Strategic analysis is especially appropriate where long term guided change is desired in complex, organic systems; ones likely to be basically influenced by the dynamic nature of the key external factors and their composite societal forces. Recognizing uncertainty and change as the norm, it relies mainly on alternative futures scenarios for forecasting, and not linear, deterministic methods. Recently there has been an increase in the use of multiple future scenario analysis in analysis and policy formation for especially rural land and landscape change and management (e.g. Moss, 1994; Moss *et al.,* 1999; Glorioso, 2001, 2006; Ewert *et al.*, 2005; Ingram and Villa, 2006; Johnson *et al.,* 2006; Lundström *et al., 2006).*

Strategic analysis also requires that there is explicit agreement among the researchers or analysts and clients on the exact objective of the analysis. Furthermore, the objective or mission of an analysis must be quite clearly stated and in sufficient detail to subsequently be used as criteria for monitoring and evaluating application of the analysis or its resulting strategy. In the context of planning, the mission or objective of this approach is considerably more explicit, and therefore is usually a more effective tool than the 'goal' and 'objective' used in comprehensive planning and master planning. This approach takes advantage of the whole brain capability of integrating logic and intuition in analysis, and is also well suited for use by interdisciplinary and multi-skilled teams (Jauho, 1994; Moss, 1994, 2006; Ringland, 1998, 2002; Moss *et al.*, 1999; Ogilvy, 2005; Glorioso and Moss, 2006; Wilson and Ralston, 2006).

The present techniques used in attempting to manage the effects of amenity migration, typically without the benefit of understanding and specific recognition of this complex phenomenon, have been of some value, especially for limited land conservation purposes. But from a larger community and strategic perspective they have typically resulted in fragmented, partial and shorter-run sub-optimizing. Here we are referring to master planning, comprehensive planning, and the more specific environmental conservation tools of protective zoning, land trusts, impact fees, density bonuses, conservation easements, development rights purchase, etc. (Moss, Ch.1, 2006). The use of the amenity migration construct outlined here, or a similar one, coupled with strategic analysis, should provide a superior approach to managing amenity migration. In addition, such a framework will render the conservation techniques noted above more productive, assuming their specific place appropriateness. We also suggest that using this strategic approach will encourage the development of more effective and equitable instruments for measuring and managing the change, use and abuse of high amenity places, such as common amenity attributes accounting and socially equitable compensation for associated benefits and costs; community and specific activity user-friendly, ecological foot printing and sustainability indicators; and census analysis reflecting today's multi-residential reality.

Research Priorities

In closing we would like to suggest research priorities for obtaining greater understanding of amenity migration and to assist in managing it in a manner that will sustain mountain ecologies and their human communities. Particular attention should be given to:

- developing a more detailed, explanatory typology of amenity migration, and its systemic relationship to tourism, urbanization and other migration to and from mountain regions;
- increasing knowledge about the socio-cultural aspects of amenity migration, while systemically linking it to biophysical and economic dimensions;
- developing knowledge on global climate change's likely effects on mountain amenity migration;
- increasing knowledge about amenity migration in economically developing countries;
- increasing knowledge about amenity migration and indigenous peoples;
- designing considerably more affordable ecology-sustaining and resource-conserving mountain human settlements, including all support systems; and
- developing more effective means of integrating local and regional human settlements growth management with public lands management, especially parks and protected areas, specifically utilizing strategic analysis and planning.

There are probably other candidates for this list, especially when addressing the condition of specific place. However, whatever the case being considered, amenity-led migration to mountain regions merits much greater attention than it is presently receiving to mitigate its present negative effects, avoid them in the future, and take greater and superior advantage of its benefits.

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