

UNDERSTANDING AND MANAGING THE EFFECTS OF
RESIDENTIAL TOURISM ON QUALITY OF LIFE IN FERNIE

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ABSTRACT

Globalization and the subsequent innovations in technology, communications, and transportation have stimulated an increase in human mobility. A part of this trend involves movement of entrepreneurs, employees of relatively 'foot loose' firms, retirees, and residential tourists (RTs) to areas possessing high quality natural and cultural amenities. RTs are those who eventually purchase property in these places and use those assets on a non-permanent basis. Their effects on tourism areas are largely unknown. This research employs a case study approach to understand RTs and identify planning responses to the pressures that they place on Fernie. Four key challenges to Fernie's overall quality of life are identified: low occupancy of properties, reduced housing affordability, expansive land development, and displacement of residents. RTs also create significant opportunities. Key informants point to the potential to leverage RT human and social capital, and environmental preferences as agents for community development and quality of life enhancement.

Keywords: residential tourism, amenity migration; Fernie; quality of life; community tourism planning, resort development; indicators

QUOTATION

“Do you want to be a mountain community that welcomes visitors or a resort community that tolerates residents?”

(Anna Pollock, 2009)

“The love of wilderness is more than a hunger for what is always beyond reach; it is also an expression of loyalty to the earth, the earth which bore us and sustains us, the only home we shall ever know, the only paradise we ever need - if only we had the eyes to see.”

(Edward Abbey, 1982, Down the River)

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ABBREVIATIONS

AM	Amenity Migration
BC	British Columbia
DCC	Development Cost Charge
DPA	Development Permit Area
FAR	Fernie Alpine Resort
FAST	Fernie Alpine Ski Team
GDP	Gross Domestic Product
ISA	Importance-Satisfaction Analysis
IT	Information Technology
LGA	Local Government Act
OCP	Official Community Plan
OCP-IC	Official Community Plan Implementation Committee
QoL	Quality of Life
QoLSC	Quality of Life Sub-Committee
RCR	Resorts of the Canadian Rockies
RDEK	Regional District of East Kootenay
RT	Residential Tourist
SD	Sustainable Development
SG	Smart Growth
TLAM	Tourism-led Amenity Migration
WTO	World Tourism Organization

CHAPTER 1- INTRODUCTION

1.1 Research Rationale

Globalization and the subsequent innovations in technology, communications, and transportation have stimulated an explosion in various forms of human mobility. New forms of mobility increasingly allow people to visit, live, work, and/or retire in areas possessing high quality of life resources (e.g. recreational and tourism assets, climate, scenery, rural living, etc.). Such areas, often tourism communities, recognize the economic development potential of these amenity-led migrations. These communities tend to possess high quality natural and cultural amenities and be relatively accessible via air and land. Accompanying new tourism and amenity migration trends is the influx of second home owners, or ‘residential tourists’ (RTs). Collectively, residential tourism has the potential to create unprecedented transformations in the socio-cultural, environmental, and economic conditions of host communities.

For residential tourists attracted to high amenity areas, mountain communities are especially appealing destinations. Mountainous areas hold some of the world’s greatest scenery, and support numerous recreational activities which are specific to these areas, such as downhill skiing, mountain biking, and white-water rafting (Nepal & Chipeniuk, 2005).

Residential tourism can both benefit and negatively impact the quality of life in host communities. Positive effects are tied to the development of vacation homes which stimulates jobs in the construction and renovation industries (Lloyd Levy Consulting, 2004), creates new business opportunities, and increases property tax flows for the local government. From a more challenging perspective, demand typically drives up real estate prices and can make housing unaffordable for local residents (Glorioso & Ross, 2007; Moore, Williams, & Gill, 2006; Hettinger, 2005). The lack of housing options for residents leads to displacement of critical host populations, essential for supporting a thriving tourism industry and economy (Glorioso & Ross, 2007, Thompson, 2006; Bush, 2006).

This study uses a case study assessment of Fernie, a mountain community located in the Southern Rocky Mountains of Canada. Over the last decade, Fernie has been transitioning from resource extraction towards a tourism and service-based economy. In

Fernie's Official Community Plan (2004), residents identified quality of life as a key area of concern as the community grows and changes. Community members were concerned that new tourism and resort development might adversely affect their quality of life. In response, the city has commenced monitoring and reporting on quality of life indicators (City of Fernie, 2003).

This research answers the question "How can Fernie manage residential tourism to enhance overall community quality of life." The aim is to identify social, economic, and environmental transformations and produce a suite of local management strategies for addressing challenges and enhancing opportunities of residential tourism.

1.2 Research Objectives and Questions

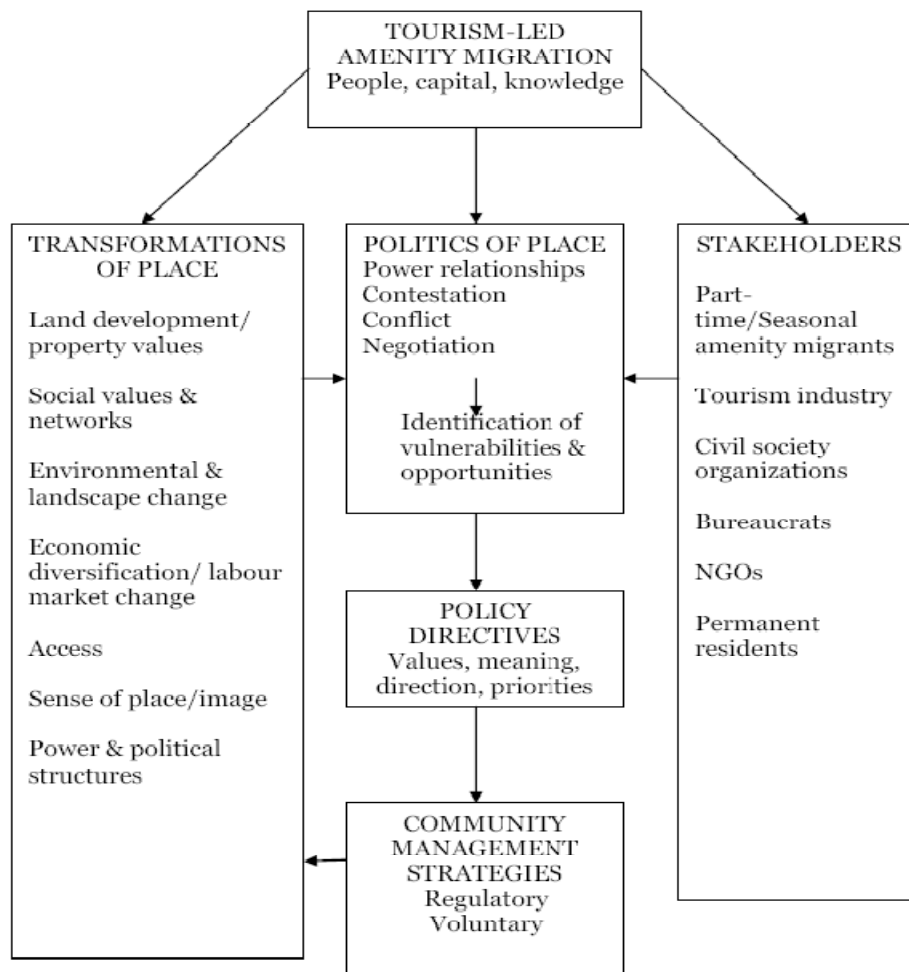
This research contributes to a larger project entitled 'The Role of Tourism-Led Amenity Migration in the Transformation of Place', carried out at Simon Fraser University's Centre for Tourism Policy and Research. The project explores the linkages and interactions of tourism and migration with respect to the transformation of place, and uses case-study assessments of rural communities in British Columbia (Gill and Williams, 2006). This research focuses specifically on residential tourism and employs a case-study of Fernie, BC to address the following primary research and sub-questions:

- 1) What are the socio-demographic and behavioural characteristics of RTs in Fernie?
- 2) What factors affect quality of life for Fernie's residential tourists?
 - a) What factors are perceived to be most important to quality of life of residential tourists?
 - b) How satisfied are they with Fernie's QoL offerings?
- 3) How do community stakeholders perceive the effect of residential tourism on quality of life in Fernie?
 - a) How do residential tourists shape the socio-cultural attributes of Fernie?
 - b) How do residential tourists affect Fernie's landscape and environmental attributes?
 - c) How is residential tourism transforming Fernie's economy?
- 4) What are the policy and planning implications of residential tourism's affect on the QoL in Fernie?

1.3 Research Approach

This research is centred within the context of Gill and Williams' (2006) framework of 'Tourism-led Amenity Migration and the Transformation of Place' (Figure 1). A literature review, residential tourist survey, and key informant interviews are used in a case study of Fernie, BC. From a broad community tourism perspective, this research explores how people, capital and knowledge move in and out of Fernie, including the related community transformations and effected stakeholders involved in the process. More specifically, this research examines the transformations (social, environmental, and economic) occurring in Fernie as a result of residential tourism, and how quality of life assets might be effected by such changes.

Figure 1- Tourism-led Amenity Migration Framework (Gill & Williams, 2006)



Gill and Williams' (2006) framework outlines the role of politics in the planning and development of tourism communities. It has been demonstrated that traditional 'power elites' such as development and entrepreneurial interests tend to use their power to secure desired planning outcomes in tourism communities (Reed, 1997). Management strategies in tourism communities then, are dependant not only on policy directives of the City (including community values and priorities), but also on the influence of various stakeholders –including residential tourists. Chapter 3 (Research Method) details the research methods used to explore these issues.

1.4 Research Significance

Theoretically, this research expands the existing literature on the conceptualization of tourism-induced mobility in mountain tourism communities. Using Gill and Williams' (2006) 'Tourism-led migration and the transformation of place' model as a conceptual framework, this research highlights the relationship between residential tourism and quality of life in a transitioning tourism community. The methods and conclusions of this research will help direct further studies in this area, and make a useful contribution to the discussion of transformations related to amenity-driven change in tourism communities.

On an applied level, this research provides a case study model for the management of quality of life assets in a mountain tourism community context. The research findings may provide local decision makers with insights into how small tourism communities can adapt, cope with and utilize growing numbers of residential tourists to achieve economic, social and environmental management goals. The findings and recommendations of this report are intended to help Fernie and other mountain tourism communities become more proactive in planning and managing the effects of residential tourism so that broader and collective quality of life objectives are achieved. It is hoped that these findings will also be examined and tested in the context of other mountain tourism destinations confronted with residential tourism pressures.

1.5 Report Organization

This report is divided into six chapters. Chapter Two reviews and discusses literature relevant to the study and provides a contextual framework for this research. Chapter Three describes the methods used in this study's research, including the interview and survey processes. Chapter Four presents the research findings emanating directly from the key informant interviews and survey. Chapter Five discusses the research findings from a policy and management perspective and provides recommendations informed by the research findings. Chapter Six provides conclusions drawn from this study and offers future research possibilities.

CHAPTER 2- LITERATURE REVIEW

2.1 Introduction

This chapter explores four distinct but interrelated bodies of literature. First, the concept of residential tourism is examined from a theoretical and planning perspective. The section starts with an important definitional discussion of residential tourism, and contextualizes it with respect to current conceptualizations of tourism and amenity migration. Section two explores quality of life in the context of sustainable community planning. It includes a discussion of the relationship between quality of life (QoL) and residential tourism. The review then explores tourism resort development from a provincial policy perspective, and identifies specific implications for mountain tourism communities in BC. Finally, there is a brief review of policy and planning strategies for managing residential tourism in mountain tourism communities.

2.2 Residential Tourism

Globalization and new forms of mobility are creating significant changes in tourism destinations. Sheller and Urry (2006) explain this new mobility:

“All the world seems to be on the move. Asylum seekers, international students, terrorists, members of diasporas, holidaymakers, business people, sports stars, refugees, backpackers, commuters, the early retired, young mobile professionals, prostitutes, armed forces- these and many others fill the world's airports, buses, ships, and trains.” (p.207)

This new mobility, driven largely by globalization forces has many consequences for people and places across the globe. In particular, tourism communities once experiencing only tourism are now coping with new forms of mobility, ranging from short-term tourists, to semi-permanent vacation home owners (residential tourists), and permanent amenity migrants (Rodriguez, 2001; Williams and Hall, 2000). This new mobility adds a subtle but important layer of complexity to planning in tourism communities. It is now necessary for them to consider the ramifications of tourism, residential tourism, and amenity-led migration in their planning processes. Understanding relationships between these phenomenon requires a clear understanding of the driving

forces and motivations behind them. This section clarifies these terms and then explores their significance in terms of planning implications for host tourism communities.

2.2.1 Defining Concepts and Terms

In this paper, three key terms are used to describe different forms of mobility in tourism destinations: tourism, residential tourism, and amenity migration. Each term is described in the following section.

Tourism has traditionally been conceptualized as the temporary travel of people for pleasure purposes (Cohen, 1974). Cohen (1974) provided an early conceptual classification of a tourist trip as being temporary, voluntary, pleasurable, novel, and non-recurrent. Cohen's criteria provide a foundation for exploring how new forms of mobility are altering the traditional tourism paradigm. Most notably, 'non-recurrence' is no longer a required tourism criterion. Jaakson (1986) notes that recurring tourism visits involving the use of vacation homes are now a legitimate part of the tourism industry and that "...by ignoring it (the use of vacation homes), a large part of domestic tourism travel, infrastructure and behaviour would be excluded" (p.386). Indeed, many tourism destinations are now focussing on encouraging this form recurrent tourism.

Numerous researchers include second home visitation as a form of tourism behaviour, and various terms can be found in the academic literature to describe this tourist-oriented action, including:

- Residential tourism (Mazon, 2006; Casado-Diaz, 1999),
- Real-estate tourism (Mazon, 2006),
- Second home domestic tourism (Jaakson, 1986),
- Marginal/minimal tourism (Cohen, 1974), and
- Permanent tourism (Jaakson, 1986, Cohen, 1974)

The term 'residential tourism' describes a collective set of non-residents using tourism destination homes for leisure (Leontidou & Marmaras, 2001). The term has primarily been used in the context of international retirees on the coast of Spain (see Rodriguez, 2001; Leontidou & Marmaras, 2001; & McWatters, 2009). Rodriguez (1999) characterizes the residential tourist (RT) population in Spain as a mobile group of people motivated by tourism characteristics in a specific area who buy housing for temporary use

throughout the year. McWatters (2009) elaborates on Rodriguez's criteria adding that RT's often possess an intention to create a lasting home in the host destination. He suggests that residential tourists not necessarily relocate to a destination, but rather they form a deeper connection with it than would a typical tourist.

In contrast to the characterization of vacation home owners as a form of tourism, numerous authors conceptualize this phenomenon as a form of migration, utilizing terms such as:

- Amenity migration (Moss, 2006a),
- Semi-migration (Flognfeldt, 2002, as cited in Hall & Muller, 2004),
- Summer migration (Finnveden, 1960, as cited in Hall & Muller, 2004),
- Return migration (Leontidou & Marmaras, 2001),
- Retirement migration, (Rodriguez, 2001) or
- Tourism-led amenity migration (Gill, 2008).

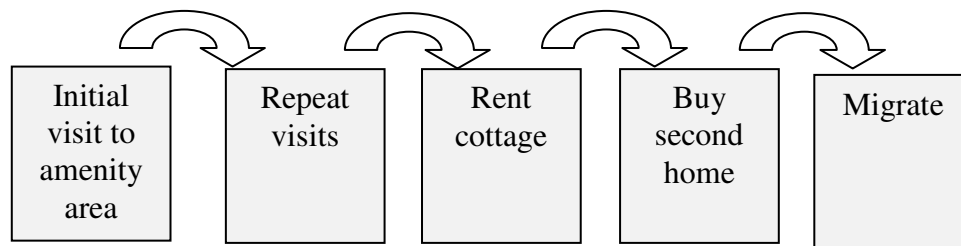
Particularly in North America, the term amenity migration (AM) has gained prominence as a way to conceptualize all forms of tourism-induced mobility, including 'residential tourism'. Moss (2006b) defines amenity migration as "migration to places that people perceive as having greater environmental quality and differentiated culture" (p.3). He includes three temporal categories of migrants: intermittent, seasonal and permanent. Little work has been done to further conceptualize and define AM beyond Moss' three categories and it remains an ambiguous term interpreted to include persons ranging from permanent migrants, (including entrepreneurs and telecommuters), to seasonal resort workers, to intermittent vacation and investment property owners, and long stay tourists (Chipeniuk and Rapport, 2008). Such ambiguity highlights the need for explicit and precise' definitions when attempting to measure and quantify AM (Chipeniuk and Rapport, 2008)

2.2.1.1 The Tourism-Migration Nexus

From the differing conceptualizations of recurrent and long stay tourism discussed above, it is apparent that increased societal mobility is blurring the lines between tourism and some forms of migration. Williams and Hall (2000) describe this as a 'grey area' of distinction. They note that new forms of 'migration' are linked to the tourism industry in two distinct but interrelated ways. First, increased development of tourism infrastructure

and amenities in a destination can increase tourism traffic, but also make the destination more appealing to potential migrants. Second, tourism can define the search spaces of new migrants. That is, upon visiting a destination as a tourist, one may decide to subsequently purchase property and move to the location permanently or temporarily. This transition from tourist to migrant is illustrated by Stewart (2000) who demonstrates how initial visits to an amenity rich area can lead to subsequent visits, purchase of a second home, and eventual migration (Figure 2).

Figure 2- The Transition from Tourist to Migrant



Adapted from: Stewart (2000)

The latter part of Stewart’s (2000) model (the transition from second home to migration) has been demonstrated to differing degrees in past studies. McNicol and Sasges (2008) found that 28 percent of Canmore’s second home owners were planning to retire full time in the community. This transition was also apparent in the resort area of Northwest Colorado, where Venturoni (2003) found that 14 percent of second home owners planned to either retire or move full-time to their second home destination. Conversely, some authors suggest that second home purchase may not be related to prior tourism visits, but is rather a function of family life stages, financial security and leisure time (Kuentzel & Ramaswamy, 2005).

Stewart’s (2000) model in its entirety (the transition from tourist to migrant) can be defined as ‘tourism-led amenity migration’ (Gill and Williams, 2006). Although various studies demonstrate how natural and recreational amenities attract migrants (see Rudzitz, 1999; Beale and Johnson, 1998), little empirical evidence exists to demonstrate the transition from tourist to migrant. The exception is with retirees on the coast of Spain. Studies from the Spanish Coast have found that between 70 percent (MUNRES, 1996,

cited in Rodriguez, 2001) and 90 percent (King et al., 1998, cited in Rodriguez, 2001) of retiree migrants had previously visited as a tourists. Similarly, Rodriguez (2001) found that previous tourism experiences to this area increased faithfulness to the destination through repeat tourism visits and retirement migration. He noted several factors that contribute to tourism-migration decisions, including:

- Appropriate environmental conditions;
- Adequate tourism-related infrastructure;
- Proximity to permanent residence; and
- The development of transportation networks

Although the transition from tourist to migrant for non-retirees (e.g. young professionals and families) has been postulated (see Williams and Gill, 2006; Buckley, 2005; Thompson 2006), the connection is not well established. Kuentzel & Ramaswamy (2005), in a 50 year longitudinal study in the resort town of Stowe, Vermont, found that increasing tourism infrastructure (lodging rooms, restaurant seats, and tourism related retail stores) did not necessarily lead to increased amenity migration. Likewise, Chipeniuk (2004) suggests that permanent amenity migration to mountain communities in BC's interior may exist independent of tourism, primarily through word of mouth. Empirical studies have not yet provided sufficient evidence that tourism is a 'recruiting post' for migration into mountain tourism communities.

2.2.1.2 Decoupling Key Terms

Given the complexities and links between tourism and migration, and the limited understanding of the distinction between these terms amongst academics and practitioners (Chipeniuk and Rapport, 2008), explicit definitions of concepts is imperative. In the following section, I attempt to decouple three key terms: tourism, residential tourism, and amenity migration (see Figure 3).

Tourists are those who visit temporarily, including recurrent visits, and can include business travellers and those visiting friends and relatives. The primary distinction between tourism and residential tourism is in the ownership of vacation property. Figure 3 shows that residential tourists can either decide to purchase property after having visited the destination as a tourist, or without a prior visit to the destination.

Those who purchase without prior visitation will discover the place by word of mouth, from friends, or are influenced by marketing and promotion of the destination.

Residential tourism then, describes those who:

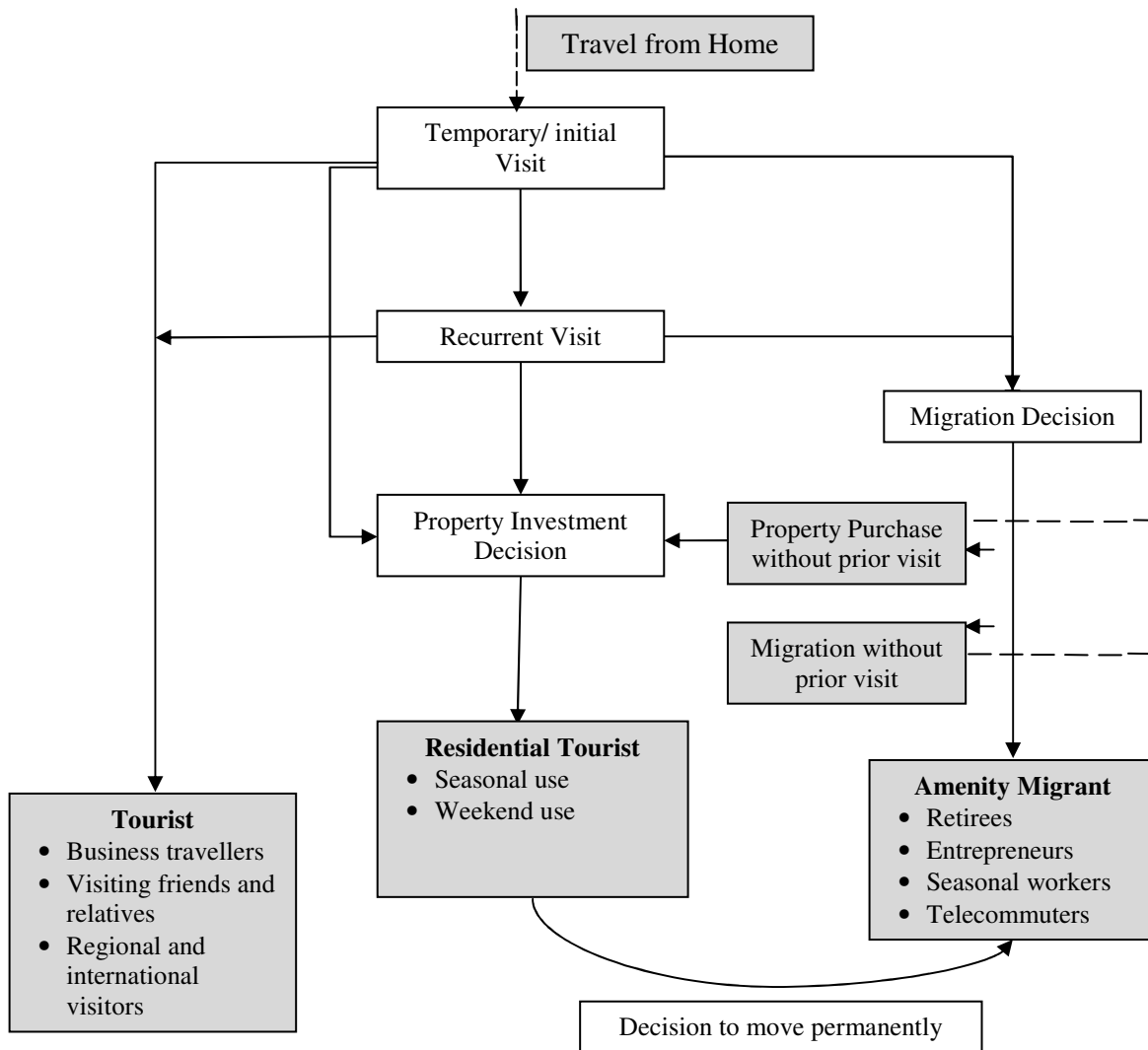
- Permanently reside outside the host destination;
- Own a property in the destination; and
- Use their property for weekends, holidays and/or seasonal vacation purposes.

Use of the term ‘residential tourist’ to refer specifically to non-residential property owners is new. This residential tourism description is consistent with research referring to ‘second home owners’ (e.g. Shucksmith, 1983). However, given the complexities of new mobility, and the potential for people to own third, fourth and fifth homes, residential tourism is seen as a better descriptor of this phenomenon, than ‘second home owner’. RTs reside in ‘residential’ areas, as opposed to tourists using commercial accommodations, and are motivated by the ‘tourist’ attributes within a destination.

Consistent with Buckley (2006) and Chipeniuk (2004), this paper describes ‘amenity migration’ as permanent movements to amenity rich areas. Included in this ‘permanent amenity migration’ category could be retiree migrants, telecommuters, seasonal resort workers, and entrepreneurs. Amenity migrants could either be renters or owners of property in the destination. Figure 3 provides a simple representation of the distinction between tourists, residential tourists, and amenity migrants in the context of amenity-based rural communities.

Figure 3 expands the ideas of Stewart (2000) (outlined in figure 2) and graphically depicts the interconnectedness between tourists, RTs, and AMs. Starting from the top of the diagram, the dotted line represents those who travel from home to a destination, as a tourist. This group can include business travellers and those visiting friends and relatives. The initial visit may be followed by either: a recurrent visit, the acquisition of a seasonal or full-time rental property, a purchase of a vacation property, or permanent migration. However, the boxes with dotted arrows (on the right side of the figure) demonstrate that RTs and AMs can purchase property and/or migrate to the destination without having previously visited the area as a tourist. Furthermore, RTs can subsequently decide to move permanently to the destination and become AMs.

Figure 3 - Definitions and transitions of the tourist, residential tourist, and amenity migrant



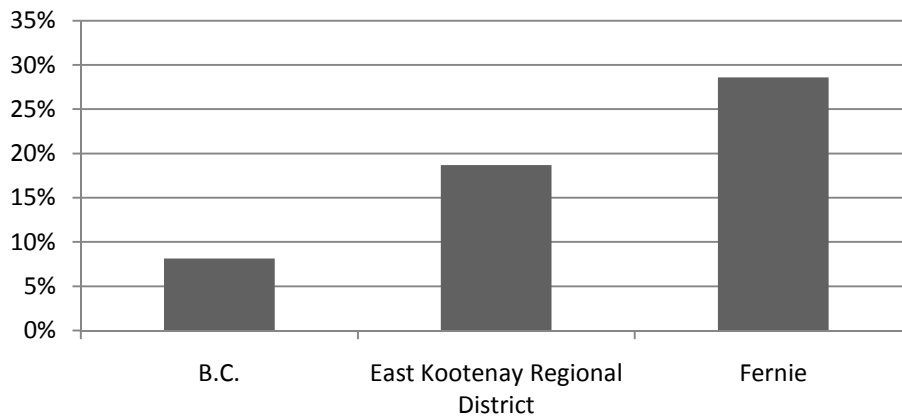
2.2.2 The Residential Tourism Phenomenon

The history of residential tourism likely dates back thousands of years when vacation cottages in the European countryside were an asset of the nobility (Hall & Muller, 2004). Today, residential tourism is prominent across the globe and significant in high amenity rural areas, and coastal, and mountain communities. A 2003 study found that more than six million United States (US) residents own second homes (Francese, 2003). Residential tourism is big business with annual spending on the construction, marketing, financing and maintenance of these homes estimated at \$19 Billion per year (Francese, 2003). In the United Kingdom, an estimated 600,000 British people own second homes around the world, primarily on the coast of Spain (Barrow, 2006).

Information on the total number of second homes in Canada is not available, however Halseth (2004) suggests that second home ownership is widespread across all regions of the country.

The 2006 BC census includes a recently introduced category which tracks the number of dwellings occupied by people who do not consider the area their usual place of residence. When used as a proxy for second home ownership, planners and researchers can use this statistic to determine the extent of residential tourism in specific regions. As the category is new, historical trends for BC are unavailable. In 2006 there were over 145,000 second homes in BC, representing 8 percent of all residential dwellings¹. The City of Fernie has 29 percent of its residences classified as second home ownership, while the East Kootenay Regional District (EKRD) has 19 percent in this category (Figure 4).

Figure 4 - Second home ownership in BC, the EKRD, and Fernie (Percentage in proportion to all homes)



A review of tourism-dominated areas and high amenity rural areas confirms that second home ownership is widespread in BC. Second home ownership is high in the resort areas of Whistler (55%), Radium (55%), and Tofino (28%). It is also strong in some rural areas, including the EKRD area F near Fairmont and Invermere (59%).

¹ Second home data obtained by subtracting total number of 'private dwellings' from 'private dwellings occupied by usual residents' in the 2006 census.

2.2.3 Driving Forces of Residential Tourism

Driving forces behind residential tourism can be divided into demand and supply-side factors. From a demand-side perspective, Francese (2003) concludes that second home demand is driven by two factors: demographics and economics. Demographically, baby boomers are in the prime life stage for buying second homes and are responsible for much of the residential tourism phenomenon in North America. Second home purchase is also influenced by regional economic conditions and favourable interest rates. When economic conditions are good and interest rates low, second home purchases increase (Kuentzel & Ramaswamy, 2005; Robinson & Stark, 2006).

Other studies however suggest that there is more at play than simply demographics and economics. For example, Williams and Gill (2006) allude to a growing interest in areas rich in social, cultural, and environmental amenities as being related to a search for ‘psychic’ income. That is people are willing to substitute a certain amount of their financial income gained through employment in urban areas, for psychic income associated with quality of life in amenity rich areas. It is possible as well then, that people are willing to work less in urban centres, taking a pay cut, and freeing up time to spend at a second home. Moss (2006b) describes this as a general societal shift in environmental values, stating that:

“Rural landscapes, their mountains, forests and waters... [are]...being sought around the world as leisure, learning or, more generally, quality of life experiences.” (p.7)

In addition Moss (2006b) identifies three demand-side trends increasing the interest in amenity-related migrations, a concept within which he includes residential tourism. These include: access to technology (communication and transportation), discretionary time, and wealth. An increase in these factors can also increase the number of people purchasing second homes, and the amount of time they are to spend in those homes. For example, new internet technology or faster more reliable transportation to a destination can make it easier for residential tourists to purchase second homes and spend more time in their home.

Destinations also play a significant role in either facilitating or deterring residential tourism by influencing various supply factors. Hall & Muller (2004) note two primary factors that increase the potential for second home demand; proximity to large urban centres, and the quality of the natural and recreational amenities. Proximity to a large urban centre is one of the most frequently cited factors influencing residential tourism demand (Greer and Wall, 1979; Johnson & Stewart, 2005; Williams and Gill, 2006), dating back to some of the earliest work on residential tourism done by Wolfe (1952). However, globalization and advances in communication and transportation technologies have likely erased any distance 'limits' to second home ownership (McWatters, 2009).

The presence of natural and recreational amenities play a significant role in attracting not only residential tourists (Williams & Gill, 2006; Buckley, 2005), but also new amenity migrants (McCarthy, 2008; Moss, 2006b), mobile firms (Garber-Yonts, 2004), and skilled entrepreneurs (Snepenger, Johnson, & Rasker, 1995). The amenities that attract such people include: environmental amenities such as clean air, and water, scenic landscapes and wildlife diversity; and lifestyle resources including health, education, recreation, and arts (Williams & Gill, 2006). Moss (2006b) identified the existence of 'comfort amenities', such as: paved roads, water, electricity, waste management systems, hospitals, and libraries as key attractants. Further to such amenities being attractants, Deller, Tsai, Marcouiller, & English (2001) identified a positive relationship between amenities, quality of life, and local economic performance. That is, areas with high quality natural and cultural amenities, and a higher quality of life, perform better economically than those without such amenities.

A final destination supply factor identified by Williams and Gill (2006) relates to growing levels of commercial promotion by tourism and real estate companies. This promotion can influence residential tourism patterns and determine the extent to which a destination attracts tourists, RTs, and amenity migrants.

2.2.4 Residential Tourism Impacts

This section reviews the benefits and impacts of residential tourism with a focus on mountain tourism destinations. Much of the academic discourse on residential tourism

has focused on impacts to rural areas (see Wolfe, 1952; Gallent, Mace, & Twedwr-Jones, 2005; Gallent & Tewdwr-Jones, 2000), while little has focused specifically on communities transitioning from resource to tourism-based economies. Research has recently emerged focusing on amenity migration in mountain communities (see Moss, 2006a; Williams and Gill, 2006; Glorioso, 2000; Glorioso & Moss, 2007, etc.), however little has been done to separate specific impacts of residential tourism from those of the more general amenity migration phenomenon. The distinction between residential tourists and amenity migrants is important from a community planning perspective as it allows for more precise identification of challenges and subsequent planning responses.

Residential tourism has many positive and negative implications for destination communities. Housing development provides municipal tax revenues for local governments and stimulates activity in the construction and renovation industries. For mountain communities traditionally focused on winter ski tourism, summer resort development (e.g. golf courses) aimed at residential tourists (RTs) can help diversify the tourism economy and extend the tourist season. In addition, residential tourists, if they choose to engage in the community, can bring significant human capital.

As early as the 1950s, Wolfe (1952) identified the transformational effects that residential tourism could have on the landscapes and communities in host destinations. He noticed how as cottage owner's in Wasaga, Ontario increasingly sought peaceful countryside retreats, the rural landscape and local community of Wasaga was transformed into the same urban-type landscape that everyone was seeking to escape. Wolfe (1952) realized both that the amenities of a place (e.g. recreation, quality of life, climate, scenery, etc.) were attracting people to Wasaga, and that amenity-led growth and development created significant stresses on communities and landscapes in the area. The end result, if not managed effectively is a loss of community appeal for both residents and tourists. This result is summarized by Korber and Rasker (2001) who observe:

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

Successful development in mountain tourism communities then, is dependent on ensuring that development is conducted in such a way that maintains community values and amenities that attract people to the place.

2.2.4.1 Environmental Implications of Residential Tourism

The natural environment of a destination is often the key attraction for residential tourists and a significant contributor to the quality of life of residents. Host communities then, should be predisposed to conserving their environmental attributes to the benefit of tourists and residents.

It has been hypothesized that RTs are attracted to areas of high environmental quality, and therefore bring with them strong conservation and environmental ethics that constrain further development. Their “last man in” attitude to development works to preserve the desirability of their vacation developments to the exclusion of others. Smith and Krannich (2000) found that RTs tend to support land use and development that maintain environmental quality. Likewise, Hall and Mueller (2004) and Gill and Welk (2007) observe that RTs tend to promote the preservation and conservation of natural amenities, and are often opposed to further development. Such attitudes require at least some involvement in the affairs of the community, if they are to be effective in preserving environmental attributes.

As residential tourism is focused on the development of vacation homes, negative environmental impacts stem almost exclusively from the nature of growth and development patterns in a destination. In Northwest Colorado, the development of second homes drastically increased the development footprint of rural towns, and resulted in a loss of wildlife habitat and forested areas (NWCCOG, 2004; Venturoni, Long, and Perdue, 2005; Clifford, 2002). Similarly, Chipeniuk (2004) observes losses to riparian areas and wildlife habitat in BC as a result of residential tourism development.

Gartner's (1987) study on the environmental impacts of recreational home development in Michigan demonstrated distinct differences between effects associated with permanent versus seasonal home owners. He concluded that seasonal home owners when compared with permanent residents created greater environmental stresses. Gartner

(1987) identified significant impacts to water quality, as well as increased erosion, siltation, shoreline vegetation destruction, and wildlife habitat loss resulting from the location of seasonal home development.

Another broader environmental consideration which is not discussed in the literature is the overall environmental impact of owning multiple properties which represent an aggregate increase in per capita consumption of energy and materials. Residential tourism-related environmental impacts in the literature focus primarily on localized impacts of home development. Specifically it is the siting and design characteristics of new developments which have environmental impacts. Presumably then, many of these localized impacts can be mitigated through development and planning policies. Moreover, as RTs bring a concern for high environmental values with them to the destination, there is potential to leverage benefits from this group to preserve and enhance the natural environment in host destinations.

2.2.4.2 Economic Effects of Residential Tourism

Tourism destinations both actively (i.e. through marketing and promotion) and passively (i.e. by the existence of natural and recreational amenities) attract residential tourists. For communities once dependant on natural resource extraction, attracting residential tourists may serve as a new economic diversification opportunity (Chipeniuk, 2004; Glorioso & Ross, 2007). Much of the economic stimulus of residential tourism comes from the construction and maintenance of vacation homes. In the U.S., the construction, marketing, financing and maintenance of second homes is a \$19 Billion industry (Francese, 2003). In Northwest Colorado, where 55 percent of residential properties are owned by non-residents (NWCCOG, 2006), 45 percent of jobs, and 38 percent of total economic spending in the region is linked to the second home industry.

In addition to the jobs created by residential tourists through construction, maintenance, and renovation of homes, RTs also have generous spending habits which can benefit local economies. Venturoni (2003) found that residential tourists in Northwest Colorado spend on average, five times as much as residents on: lawn care, home security, pest control and house cleaning. They also spend four times as much on contributions to

churches, charities and educational groups. Thus, the economic wealth brought into a community by RTs can be greatly beneficial.

When focusing on amenity migrants, many authors note how local economies can prosper from the infusion of new economic wealth and entrepreneurial spirit that they bring (see Gill and Williams, 2006; Moss, 2006b). However, when focusing specifically on RTs, the benefits are less obvious. Buxton (2008) asserts that Canmore's residential tourists are not at all involved in the local economy. Low involvement has been linked to limited time spent in their vacation home (see Gartner, 1987; NWCCOG, 2006; Stedman, 2006). Economies in tourism communities rely on beds being occupied year-round and people spending money in the economy. Under-utilization of homes (or cold beds) can have a devastating effect on businesses and the overall vibrancy of a tourism destination (Bieger, Beritelli, & Weinert, 2007; Moss, 2006b).

An often cited benefit of residential tourism is the increase in local taxes provided by new property development. Property taxes and development cost charges (DCCs) are meant to help host communities finance or recoup infrastructure and service costs (Moss, 2003; Venturoni, Long, and Perdue, 2005). However, new studies are emerging which suggest that taxes and DCCs obtained from new resort style developments are often inadequate to cover long-term servicing and infrastructure costs (see Mazon, 2006; Fodor, 2009, Buxton, 2008).

Fodor (2009) conducted a more in-depth study of the fiscal and economic impacts of a destination resort on local governments in Oregon. He found that municipal costs outweighed the economic benefits of the development, stating that if the development continues as proposed:

“...local governments and local taxpayers will be left with a net cost burden of \$45.94 million...The cost will be externalized and will ultimately be borne by other taxpayers (not the resort) through some combination of higher taxes, reduced public services, and lower facility service standards.” (p.69)

The economic downfalls of new resort developments are linked primarily to the siting of such developments. They generally consist of large homes on large-sized lots,

located on the outskirts of the community. Such developments are more difficult and costly to service than compact developments located near town centres (NWCCOG, 2006; Sierra Club, 2000).

Other economic implications relate to the retail mix and ownership of local business sector in host destinations. Clifford (2002) suggests that as resort areas develop, retail businesses and services become targeted at RTs, and are often gentrified or ‘Disneyfied’ to the chagrin of local residents. Furthermore, Paradis (2000) reveals how the business district Galena, Illinois was gentrified by tourists, RTs, and AMs from Chicago. In the span of a decade, the downtown buildings went from being locally owned to foreign owned, threatening community cohesiveness and sense of place. Little work has been done to suggest that residential tourism has significant benefits for the retail mix and service sector in host destinations.

2.2.4.3 Socio-cultural Impacts

Housing affordability is a recurring theme, and often identified as the most significant impact of residential tourism on host communities (Hettinger, 2005; Gallent, Mace, & Twedyr-Jones, 2005, Moore, Williams, & Gill, 2006; McWatters, 2009). RT demand for vacation homes tends to drive up real estate prices which can displace permanent residents who decide to cash in on high real estate prices and move elsewhere, or are unable to enter the housing market (Hettinger, 2005; Moore, Williams, & Gill, 2006; Glorioso & Ross, 2007).

The replacement of permanent residents with RTs can lead to a permanent population decline and ‘cold bed’ phenomenon whereby the majority of homes are left uninhabited for much of the year. Cold beds can lead to negative impacts on neighbourhood appeal, sense of place and quality of life (Glorioso & Ross, 2007, Thompson, 2006; Bush, 2006). In addition, tourism and service workers and community volunteers can become harder to find as they are pushed out of town by escalating real estate prices (Hettinger, 2005; Moore, Williams, & Gill, 2006; Gallent, Mace, & Twedyr-Jones, 2005, McWatters, 2009).

Hettinger (2005) articulates why housing is unaffordable in most tourism communities. He asserts that a housing market failure occurs in tourism destinations when three conditions exist:

1. Topographical constraints (e.g. mountains, lakes, and oceans) restrict development;
2. Land use policy and regulations are in place to control growth and protect the environment, and
3. A demand exists for recreational and retirement properties.

The importance of Hettinger's (2005) conclusion is that the demand for recreational and retirement properties (i.e. residential tourism) is a factor which contributes to housing market failure in tourism destinations. His market failure conditions exist in most BC tourism communities. BC consists: of numerous mountain ranges and lakes which restrict development; policies which control land use, such as zoning bylaws, and development requirements; and an increasing demand for recreational properties. Following Hettinger's reason, housing will be unaffordable and unattainable for local residents in BC's tourism destinations.

Recent studies suggest that second home demand, through the inflationary pressure put on real estate prices, exerts a displacement affect on local populations (Gallent & Tewdwr-Jones 2000; Gallent, Mace, & Twedyr-Jones, 2005). The result of this displacement is the depopulation of rural areas. This displacement theory however, has been challenged by other researchers who suggest that second home buyers simply fill the gap caused by rural out-migration (Marjavaara, 2007). Marjavaara (2007) calls this the "displacement myth" hypothesizing that permanent homes contribute more to housing price increases than do second homes, and therefore displacement of permanent residents is attributed primarily to an increased demand for permanent homes. Shucksmith (1983) and Gallent, Mace, & Twedyr-Jones (2005) offer a more balanced approach concluding that where vacant or derelict homes exist, no displacement occurs. However, in areas where homes are fully occupied and there is higher demand for real estate, second home demand can inflate housing prices and displace permanent residents.

Localized conflicts are another potential effect of residential tourism. Conflicts exist between new and existing residents over growth and development issues (Clifford,

2002; Diamond, 2002; Buckley, 2005). Such conflicts are apparent in extreme cases where violence is used to express displeasure such as the Welsh countryside where, between 1979 and 1990, 171 second homes were destroyed by arsonists (Gallent, Mace, & Tweddyr-Jones, 2005).

Stedman (2006) argues that second home owners have higher levels of place attachment because they are more involved in local activities than permanent residents. Most studies however, conclude otherwise. Venturoni, Long, and Perdue (2005) found that the typical second homeowner did not vote in elections or participate in the local workforce in Northwest Colorado. Gill (2000) asserts that most second homeowners are not active in community affairs and do not vote in municipal elections in Whistler. They also show lower levels of support for the development of community services (schools, community centres, day cares, etc.) than do permanent residents (Gill, 2000).

In contrast to many of the negative effects of residential tourism detailed in the literature, studies also suggest that RTs can bring new ideas, including social and human capital into host destinations. Such conclusions however, are often associated more broadly with amenity migration (Moss, 2006b; Gill, 2008; Williams & Gill, 2006). At present there is little empirical evidence to suggest that RTs themselves provide such benefits. On the contrary, RTs are thought to be uninvolved in the local economy (Buxton, 2008) and spend relatively little time in their vacation home (see Gartner, 1987; NWCCOG, 2006; Stedman, 2006), suggesting minimal social and human capital benefits. One must recognize however the intrinsic link between residential tourism and AM (outlined in Figure 3). Significant potential exists to convert RTs to permanent residents and infuse communities with social and human capital.

2.2.5 Residential Tourism Summary

Several conclusions relevant to this paper's purpose emerge from this review of residential tourism. First, most authors generalize AM to include anyone from long-stay tourists, to seasonal resort workers, to RTs, and permanent migrants. Such an encompassing definition weakens the ability for researchers to make specific conclusions regarding policy and planning strategies for managing residential tourism.

Second, there are important relationships between tourism, residential tourism, and amenity migration. Each phenomenon is dependent on many of the same natural and cultural amenities. Residential tourism and amenity migration should be considered as critical dimensions and components within a destinations tourism planning envelope.

Third, the issue of housing affordability and the occupancy of RT properties is a recurrent and significant theme emanating from residential tourism-related literature. Many of the negative socio-economic impacts of residential tourism are tied to a lack of affordable and attainable housing for local residents, and quality of life impacts of cold beds.

Finally, the effects of residential tourism on host communities are highly dependant on how it is managed. Although some economic analyses have concluded that management restrictions on second home ownership can be undesirable (see Brida, Accinelli, & Carrera, 2007), most authors agree that some interventions can be put in place to maintain and retain healthy and sustainable communities (Bush, 2006; Gill, 2000; Moss, 2006b; Müller, Hall, & Keen, 2004).

2.3 Quality of Life

Residential tourism is intrinsically linked to the quality of life (QoL) in host destinations. The connection between these is apparent in three ways. First, perceived higher QoL is one of the primary attractants for RTs into communities rich in cultural and natural amenities (Moss, 2006b). A high QoL can draw people to visit, invest in property, and move permanently to a rural amenity rich community (Thompson, 2006).

In addition to QoL acting as an attractant for potential RTs, natural amenities and environmental quality also play a role in enhancing overall QoL in an area. That is, a positive relationship exists between QoL and high quality natural amenities (Howe, McMahon, and Propst, 1997; Putney, 2003; Vesley, 2007). Protection of natural amenities can enhance QoL by:

- Increasing recreational and educational opportunities (Hellmund and Smith, 2006),
- Providing scenic views, solitude, and community character (Fausold and Lilieholm, 1999), and

- Reducing urban sprawl, traffic congestion, noise and local air pollution (de Ridder et al, 2004)

Protection of both QoL assets and natural amenities are key factors for the sustainable development of tourism-based communities.

The third important connection between QoL and residential tourism, is potentially negative impact of residential tourism on local QoL (Moss, 2006b). As RTs move to amenity rich communities for QoL reasons, the assets that drew them there can become eroded (Marien and Pizam, 1997; Korber & Rasker, 2001). Marien and Pizam (1997) assert that tourism growth and development that is not sustainable can reduce the QoL for residents and the pleasantness of the tourist experience. Such reductions in QoL are apparent with the social, economic and environmental impacts discussed on page 15. Although QoL impacts are cited often in residential tourism related literature, no studies have been uncovered which directly address how residential tourism affects the QoL in a tourism destination. Moreover, little evidence exists relating the QoL benefits of residential tourism on host destinations.

2.3.1 Defining Quality of Life

Generally speaking, quality of life (QoL) refers to the ‘character’ of people’s lives (Szalai, 1980). Chambers (1994) expands this notion, defining QoL as “accepted standards of human development and progress and our satisfaction with those standards as they affect us” (p.8). Chambers’ (1994) QoL definition is widely accepted and fits well with the research method for this report.

Several distinct dimensions of QoL exist for planning and management purposes. First, QoL can be focused either on individuals or can be more generalized to the overall QoL in a community, province or country. Individual QoL focuses on ones personal well-being (Dissart & Deller, 2000) and is influenced by such factors as: personal relations, weather, etc. Conversely, at a community level, QoL centres on the place where QoL is experienced (Dissart & Deller, 2000). Community QoL addresses those factors that affect everyone in the community in a general way. In many cases, QoL factors are defined by a set of established indicators identified by community members. Each factor

may have a differing degree of impact on each person, yet most agree that the factors are important and effort should be made to maintain them (Sirgy, Rahtz, & Swain, 2006).

Second, QoL involves both subjective and objective dimensions (Brown, Bowling, & Flynn, 2004). Subjective QoL relates to values, experiences, and perceptions from a personal perspective. Such subjective measures are difficult to quantify and measure accurately. More measurable indicators such as income, employment, housing, and education determine objective QoL.

Third, local, regional and national governments, through policy decisions, can have a significant influence on QoL. Such institutions make numerous decisions which affect work, home, play, and the nature of a community. Michalos and Zumbo (1999) and Zumbo and Michalos (2000) use the provision of community services (such as: police protection, elderly care, snow removal, cleanliness, parks and trails, etc.) as proxies for quality of life. Government, through policy, planning, and management decisions, influence QoL.

In sum, QoL can be defined at the personal or community-wide level, be tied to subject and objective criteria, and is influenced by diverse and sometimes disparate factors including government policy, weather, and personal relations. QoL as discussed in this paper refers to QoL from a community perspective which is influenced by government policy.

2.3.2 Quality of Life Indicators

Given that QoL is a key attractant for RTs, and QoL can be eroded by the effects of residential tourism, destinations should be predisposed to preserve and enhance community QoL. Protecting quality of life assets (landscapes, schools, parks, etc.) is increasingly recognized as an integral part of local and regional development strategies (Nelson, 1999; Rudzitis, 1999). One option for directing planning priorities towards sustainable QoL is the use of an indicator initiative. QoL indicator initiatives involve first determining what QoL means to residents, and then tracking changes over time to ensure planning and development works to enhance and not degrade QoL.

Over the last few decades there has been an increasing recognition of the need for local, regional and national governments to track QoL using a systematic set of

indicators. Anielski (2001a) recognizes over 300 such initiatives in North America, at the national, regional and community levels. These initiatives generally measure QoL, but use various terms to define it, including:

- Sustainability (Fraser Basin Council, 2006; Islands Trust, 2003; Gahin, Veleva, & Hart, 2003),
- Well-being (May, 2007; NEF, 2004),
- Genuine progress or wealth (Talberth, Cobb, & Slattery, 2006; Anielski, 2007),
- Community wellness (Murphy, Olheiser, Park, Christian, & Nielsen, 2006),
- Human development (UNDP, 2007), and
- Liveability (Vancouver Foundation, 2006).

A review of the above indicator initiatives suggests that although QoL is not at the forefront of the reports, it is inherent within. That is, they all fit within the definitional realm of QoL; they measure subjective and objective indicators which are often agreed upon by a community of people, and hold relevance for government policy decisions.

At the national and international levels, there is a growing movement for nations to move beyond traditional measures of our QoL, such as Gross Domestic Product (GDP), and seek new measures of QoL which go beyond economic output (Henderson, 1994; Talberth, Cobb, & Slattery, 2006; OECD, 2007). Several sources are evidence of this trend:

- Numerous academic journals focusing on social indicator measurement such as: Social Indicators Research & Quality of Life Research;
- International conferences on GDP alternatives, such as: the International Conference on Gross National Happiness, the Global Forum on Measuring and Fostering the Progress of Societies, and the Beyond GDP Conference;
- New institutions such as the International Society for Quality of Life Research; and
- The Istanbul Declaration, an agreement signed in 2007 by a host of international organizations (including: the European Commission, United Nations, and World Bank) which commits the signatories to going beyond conventional economic measurements (such as GDP) when assessing the progress and success of our societies.

Appropriate and effective QoL indicators go beyond strictly viewing economic indicators, and also include environmental, cultural, and social priorities, and are based on values identified by the community (Chambers, 1994; Brown, Bowling & Flynn,

2004). Tracking QoL indicators, and responding to indicator trends with appropriate policy, can be an effective means for managing residential tourism impacts in host communities.

2.4 Policy and Planning Strategies for Residential Tourism

Academic literature on the planning and policy strategies for addressing residential tourism have focused primarily on second homes (cottages) in rural areas (Gallent & Tewdwr-Jones, 2000; Gallent, Mace, & Tweddyr-Jones, 2005; McIntyre, Williams, & McHugh, 2006) and on the broader amenity migration (AM) phenomenon (Moss, 2006b; Chipeniuk, 2004). As little research exposes the planning responses to residential tourism in host communities, this review utilizes various academic conceptualizations of residential tourism, and puts forth appropriate management responses.

Gallent & Tewdwr-Jones (2000) assert that options for controlling residential tourism growth fall into three broad categories:

1. Housing policy options,
2. Planning and development control, and
3. Economic and social development,

The first option outlined by Gallent & Tewdwr-Jones (2000) relates to housing policy. Several options are put forth for the provision of housing alternatives within areas experiencing recreational home demand from RTs, including non-market affordable housing. In the context of BC, Curran and Wake (2008) detail the housing policy options available to local governments for the creation of affordable housing for residents:

1. Inclusionary zoning (zoning regulations that require affordable housing in new developments),
2. Secondary suites (additional dwelling units on existing properties),
3. Density bonuses (developers may build to a higher density in return for affordable housing or other amenities)
4. Resale price restrictions (a restriction on the housing title which limits the resale price of house lower than market value)
5. Housing funds (a local government account which receives funds for affordable housing),
6. Land banking (aquisition of property by the local government).

Curran and Wake (2008) suggest that implementation and management of such policies should be achieved through local housing organizations, and partnerships between the private sector, local government and non-profit housing organizations.

A second set of options outlined by Gallent & Tewdwr-Jones (2000) focuses on planning and development controls on second homes. The authors offer two sets of suggestions, one focused on increasing the cost of second home ownership in order to reduce demand, and the other focused on land use policy. Policies to increase the cost of second home ownership, include:

- Restricting home improvement grants for non-residents;
- Implementing a differential tax system with higher rates and/or tax penalties for RTs;
- Levying additional purchasing costs on properties purchased by non-residents; and
- Creating mortgage restrictions for second home owners, whereby banks restrict mortgage opportunities for RTs.

Many of these policies are beyond the jurisdictional powers of municipalities in BC. However the Federal Government recently introduced mortgage restrictions on second homes which apply across Canada. The new restrictions increase the minimum down payment requirement non-owner-occupied (RT) properties from five to 20 per cent, making it more difficult for RTs to obtain a mortgage for their vacation property (Canadian Broadcasting Corporation, 2010). Canada's new mortgage restrictions, and the restrictive policies outlined by Gallent & Tewdwr-Jones (2000) diverge from the results of other studies. For example, Brida, Accinelli, & Carrera (2007) suggest that social welfare is maximized when the vacation home market is not regulated. They reason that second home ownership facilitates an increase in leisure time, and this increases overall social welfare. However, as Gallent & Tewdwr-Jones (2000) and Gallent, Mace, & Twedyr-Jones (2005) suggest a balance should exist between maximizing social welfare, and minimizing negative impacts at the local level.

With respect to land use policies to control second home development, Gallent & Tewdwr-Jones (2000) suggest:

- Property purchase controls (e.g. one must be a resident or employed locally to purchase a home);
- Housing sub-markets (e.g. high income earners are excluded from certain housing markets);
- Occupancy controls (e.g. homes must be occupied a certain number of days per year);
- Controls on change of owner use (e.g. exclude non-residents from property ownership when properties are exchanged)

The authors outline how community plans and development agreements must be in place to support such second home development policies.

The third set of options outlined by Gallent & Tewdwr-Jones (2000) strive to soften the socio-economic impacts of residential tourism on local residents. The authors suggest that residential tourism development should be promoted as part of a wider regional tourism development strategy. Economic benefits can be maximized by promoting residential tourism, and impacts minimized by diverting demand away from the existing housing stock (e.g. a separate resort development community).

From a more holistic approach, numerous studies are emerging which suggest that maintaining community values and quality of life (QoL) should be the primary focus of planning in tourism-based communities. For many emerging rural tourism areas, key challenges revolve around planning for and maintaining the attractive features which draw people to visit and live in the community. Retaining QoL assets in the face of residential tourism development pressure can help ensure that destinations remain appealing for both residents and tourists. Nelson (1999) outlines a process for retaining QoL assets in the face of development pressures in tourism areas:

“Instead of mortgaging a community’s future by rolling back taxes and providing cheap land in an attempt to land a single large employer, communities may benefit by focusing on improved quality of life (investment in schools, environmental protection, “greenbelts,” parks, and social infrastructure) to attract young well-educated migrants. Quality of life offers an alternative to traditional “smokestack chasing,” and by pursuing such a development strategy, communities may be able to build a more solid foundation for years of growth and development.” (p.37)

In essence, Nelson (1999) suggests that in high amenity rural areas, attracting amenity migrants by protecting and enhancing QoL can serve as the communities primary economic development strategy. There are a number of ways in which communities can strive towards Nelson's (1999) QoL development proposal. One method is what Dunster (n.d.) describes as 'slow landscapes'. Dunster elucidates the importance of slow-paced development in highly sought after amenity-rich areas:

“...if a landscape is allowed to evolve in slow motion there is a much greater chance that the land base...will be appreciated and protected indefinitely. The result should be a landscape impervious to the temptations of fast-paced changes that threaten long-term ecological health, landscape sustainability, and quality of life.” (p.1)

A second method is apparent in the growing body of literature which reveals the importance of engaging local populations in development and planning processes (Korber and Rasker, 2001; McIntyre & Pavlovich, 2006). Shindler and Nebruka (1997) (as cited in McIntyre & Pavlovich, 2006) outline three positive advantages of public participation in the planning process:

- The opportunity to capitalize on local knowledge,
- Community support for management decisions, and
- Improved quality of decision making.

Public participation in the planning process ensures local residents have a vested interest in management decisions. Korber and Rasker (2001) add that engaging locals should focus on determining what community values are with respect to quality of life. The authors use the term 'community stewardship' to describe 'locally-driven initiatives that strive to protect the ecological and cultural values of an area, while meeting a community's economic and social needs' (Korber and Rasker, 2001; p.3). Community stewardship planning is an effective means of understanding the importance of key socio-economic assets, and then working to sustain those assets long term.

CHAPTER 3- RESEARCH METHOD

This research employs qualitative and quantitative methods to explore the relationship between residential tourism and quality of life. A case study approach was used to explore this relationship in the mountain tourism community of Fernie, BC. This section provides an overview of the research questions and objectives, followed by a description and rationale for the research methods used. The chapter concludes with a discussion on the limitations of the research.

3.1 Research Objectives and Questions

This research contributes to a larger project entitled ‘The Role of Tourism- Led Amenity Migration in the Transformation of Place’, carried out at Simon Fraser University’s Centre for Tourism Policy and Research. The project explores the entanglements of tourism and migration with respect to the transformation of place, and uses case-study assessments of rural communities in British Columbia experiencing influxes of tourists and amenity migrants (Gill and Williams, 2006). This research employs a case-study of Fernie, British Columbia (BC) to address the following research questions and sub-questions:

- 1) What are the socio-demographic and behavioural characteristics of residential tourists (RTs) in Fernie?
- 2) What factors affect quality of life for Fernie’s residential tourists?
 - a) What factors are perceived to be most important to quality of life of residential tourists?
 - b) How satisfied are they with Fernie’s quality of life offerings?
- 3) How do community stakeholders perceive the effect of residential tourism on quality of life in Fernie?
 - a) How do residential tourists shape the socio-cultural attributes of Fernie?
 - b) How do residential tourists affect Fernie’s landscape and environmental attributes?
 - c) How is residential tourism transforming Fernie’s economy?
- 4) What are the policy and planning implications of residential tourism’s affect on the QoL in Fernie?

Research questions one and two target Fernie’s RT population. These questions were answered through a RT survey administered in Fernie. Following the survey, interviews with community stakeholders in Fernie were used to explore the third research

question. Finally a combination of RT and community stakeholder information was used to explore planning and management responses to residential tourism in Fernie.

3.2 Research Approach

To answer the research questions, a multi-pronged case study research approach was used. Methods of inquiry included:

1. A review of academic literature including experiences from mountain tourism communities and amenity rich areas. Literature came from a broad range of topics and disciplines including: sustainable tourism development, amenity migration, quality of life, rural change and development, indicators, mountain tourism, and urban-rural migration;
2. An online survey with non-resident property owners in Fernie;
3. Key informant interviews with business owners, elected officials, planners, non-profit organizations and other stakeholders in Fernie;
4. Review and evaluation of local media including: local radio, the Fernie Fix, the Fernie free press, and notice boards;
5. Examination of planning and management documents in Fernie, including the Official Community Plan and Affordable, Attainable Housing Strategy, Fernie area Land Use Strategy, and Comprehensive Development Plan; and
6. Experiences and informal discussions with Fernie residents, business owners, and residential tourists from in situ location through much of the study period.

3.2.1 Case Study

Case study research methods allow for applicable results based on real-life events and circumstances (Yin, 2003). In this case, qualitative and quantitative results based on surveys and interviews with Fernie stakeholders are applied to understand the planning and management implications of residential tourism. This case study is one in a broader research project exploring the transformation of tourism communities resulting from tourism-led amenity migrations (TLAM). The larger research project includes case studies of rural communities across BC with the objectives of integrating the results of each case study and:

1. Analyze how amenity-led migration is transforming the economic, social, political and environmental characteristics of amenity-rich rural tourism areas,
2. Outline and evaluate the strategic policy and planning responses being developed to address these transformational forces,

3. Advance the understanding of the regulatory and managerial implications of amenity-led migration to host communities, and
4. Expand upon the emergent conceptualization of amenity-led migration from a supply-side perspective within the framework of mobility research (Gill & Williams, 2006).

3.2.2 Primary Data Collection

Both quantitative and qualitative research methods were used to inform this case study. Quantitatively, an on-line survey of residential tourists was conducted between June and July 2009. In December 2009 and January 2010, key informant interviews were conducted with key community stakeholders. The convergence of qualitative and quantitative approaches (triangulation) helped to validate the interpretations of data collected.

3.3 Case Study Context

Fernie is a small mountain town situated in the Southern Rocky Mountains of British Columbia (Figure 5). Fernie sits in a North-South Valley just East of the Rocky Mountain Trench, and West of the Continental Divide. The nearest urban centres to Fernie are Cranbrook, 100km to the West, and Calgary, 300 km to the East. Calgary is a major urban centre with international flights connecting from all over the world. Cranbrook has recently upgraded its airport to International status with direct flights to Salt Lake City, Utah. Fernie is surrounded by spectacular natural scenery and various parks and protected areas in close proximity, including:

- Mount Fernie Provincial Park,
- Morrissey Provincial Park,
- Elk Valley Provincial Park, and
- Island Lake Wilderness Reserve.

For more than a century Fernie's economy has revolved around mining and employment in resource extraction industries. Currently there are five operating coal mines in the Elk Valley around Fernie. Mining remains Fernie's largest employment generator (City of Fernie, n.d.). In 1963, the first ski hill, Fernie Snow Valley, opened near Fernie. In 1997 the ski hill was purchased by Resorts of the Canada Rockies (RCR),

and has since seen significant expansion. Fernie is now an internationally recognized ski destination.

Figure 5- City of Fernie Location



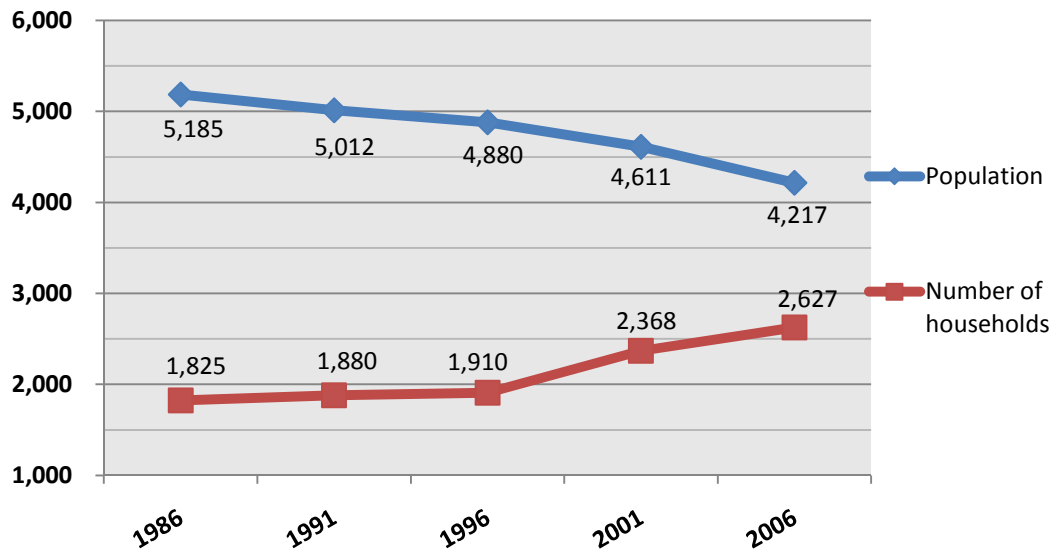
Adapted from City of Fernie (2010)

Tourism and second home development are increasingly prominent economic contributors in Fernie (City of Fernie, n.d.). In 2007, Fernie’s visitor information centre recorded over 10,000 tourist visits (City of Fernie, 2009). Between 1999 and 2005, 552 new housing starts occurred in Fernie. The large majority of which were directed toward residential tourists wishing to own vacation homes (Pringle & Owen, 2006; City Spaces Consulting, 2007; City of Fernie, n.d.). Subsequently, the price of housing has increased dramatically. Since 1993, the average price of a single family home has increased by 436 percent (from \$54,571 in 1993 to \$292,749 in 2005) (City of Fernie, n.d.). Comparatively, average price in the Kootenay region has increased only 86 percent.

Surprisingly, substantial growth in Fernie over the last decades has been coupled with significant decreases in the permanent population. Since 1981, Fernie’s permanent population has decreased by 23 percent, from 5,444 in 1981, to 4,217 in 2006 (Statistics Canada, 2007). Over the same period, the total number of households in Fernie has increased by 44 percent (1,825 to 2,627)². Figure 6 demonstrates this dichotomy.

² For the years 1986, 1991, and 1996, the census measured “total number of households”. In 2001 and 2006 the measure was changed to “total private dwellings”. Figure 6 and the ensuing discussion assume these are the same measure.

Figure 6- Population versus Number of Households in Fernie (1986-2006)



In contrast to the declines in population in Fernie, the provincial population grew by 44 percent, and the RDEK’s population grew by 6.5 percent over the same period (1986-2006). Fernie’s population decline, coupled with increased housing starts, signifies an increasing concentration of non-resident property owners (residential tourists). The trend in residential tourism development across BC is expected to continue (City Spaces Consulting, 2007), and Fernie’s future growth plans show a proposed increase of 2200 bed units by the year 2023 (City of Fernie, 2003). If developed, these new units will nearly double the number of households in Fernie, from 2800³ to 5000. Of significance is the proposal to build a large golf resort development on the outskirts of Fernie. This development is underway and will include:

- Nearly 1500 single and multi-family residential units,
- A condominium hotel,
- Commercial development,
- An eighteen-hole golf course and driving range, and
- Open space and park areas including a multi-use trail system

In March of 2009, the City of Fernie became BC’s 11th Resort Municipality allowing it to share a portion of the provincial hotel room tax revenues generated in the

³ Based on the number of “residential” properties listed in Fernie’s property tax assessment data

community to invest in local resort development projects. Further resort development is aimed at increasing tourist visits, which likely increase the extent of residential tourism in Fernie as well. As a transitioning rural economy, where the effects of residential tourism are readily apparent, Fernie makes an ideal case study for this research.

3.3.1 Fernie's Quality of Life

Given rapid growth and the potential for community transformations to impact quality of life (QoL), Fernie residents identified QoL as an important community asset to be maintained (City of Fernie, 2003). Fernie's vision for the future, as outlined in their Official Community Plan, emphasizes the importance of maintaining a high quality of life:

“To work towards a sustainable population who will enjoy a quality of life that is planned and managed in a manner compatible with the surrounding natural environment. This quality of life will be based upon employment and social opportunities for all skill levels in all sectors, affordable housing, quality education, a convenient and efficient transportation network, enhanced cultural and heritage amenities, and optimal recreation opportunities.” (City of Fernie, 2003, pg.7)

To ensure Fernie's vision for the future is followed, and the strategic goals of the Official Community Plan (OCP) are realized, an OCP Implementation Committee (OCP-IC) was formed. The committee consists of 11 members, including six members of the community at large. From the OCP-IC, a quality of life sub-committee (QoLSC) was struck to track QoL and annually produce a liveability report to guide the City's planning and policy decisions (City of Fernie, 2003). This research makes a strong contribution to Fernie's QoL planning efforts by investigating the benefits and challenges of residential tourism for overall QoL, and investigating the QoL perceptions of Fernie's RT population.

3.4 Residential Tourist Survey

In June and July of 2009, an online survey was conducted with residential tourists in Fernie. The survey was a collaborative endeavour, which went beyond answering the

research questions of this project. The survey had input and direction from various stakeholder groups in Fernie, including:

- Fernie's QoLSC which sought information on how RTs perceived the quality of life in Fernie;
- The Fernie and District Arts Council who were interested in arts and cultural preferences of RTs;
- Island Lake Resorts who were curious about the perceptions of RTs with respect to the offerings at the Resort; and
- Fernie's Director of Planning and Chief Administrative Officer who ensured the survey reflected the needs of the City staff and their QoL goals.

Given the diverse stakeholders involved in the successful planning of this survey, the results contain information which satisfies the interests of numerous collaborating parties, some of which is beyond the scope of this paper and not included in Chapter 4.

3.4.1 Survey Method and Justification

The survey research employed a postcard mail out with directions (web link) to an online survey. Online surveys are rapidly becoming a mainstream form of data collection. There are some distinct advantages associated with online survey methods. Online surveys are generally thought to be faster and less expensive than traditional mail surveys (Dolnicar, Laesser, & Matus, 2009). In addition, some authors note that respondents are more likely to answer open ended questions on web-based surveys (Shermis & Lombard, 1999). They are also suited to situations targeting respondents who are linked specifically to a research theme.

There are also disadvantages to using an online survey. Notably, online surveys generally obtain lower response rates than mail surveys (Kittleson, 1995). In a comparison of four different survey methods (including telephone, e-mail, online, and interactive voice recognition), Bason (2000) found the online survey achieved the lowest response rates. To increase response rates of online surveys, Kittleson (1995) recommends that online surveys be followed up with reminder notices to participate in the survey.

The postcard mail out and online survey method were chosen for this research for various reasons. Given the transient nature and infrequent property visitation of RTs,

door to door solicitation would be ineffective. Furthermore, phone numbers and e-mail addresses are not available for this group; therefore related survey methods were not possible. Tax roll data for Fernie RTs was available, allowing for identification of non-resident property owners based on location of permanent residence.

Second, the online survey method was chosen over a paper survey as significant cost savings are obtained by avoiding printing costs. Third, responses from the online survey can be received instantly, allowing for faster analysis and completion of the survey. Fourth, the data from the online survey is easier to manage as it is instantaneously inserted into an electronic format for statistical analysis.

Given time and budgetary constraints, and the availability of information, the postcard/ online survey combination was deemed the most effective method for this study. As recommended by Kittleson (1995), a survey reminder was sent to respondents in order to increase response rates. It is believed that the combination of an aesthetically pleasing Fernie postcard, and incentives provided by Island Lake Resorts were sufficient to overcome the low response rates typical of online surveys.

3.4.2 Participant Selection

Permanent addresses of part-time residents in Fernie were obtained from the BC Assessment Authority (BCAA) tax rolls. 3209 properties are listed in Fernie's tax roll. Of all Fernie properties, 2804 are classified as residential⁴. Only residential properties were included in the sample. Of all residential properties, 1044 (37%) are owned by those who permanently reside outside Fernie. To obtain a usable mailing list, two further filtering techniques were applied to the non-Fernie residential tax rolls:

- First, duplicate names (i.e. those owning multiple properties in Fernie) were excluded, and,
- Second, multiple owners were added to the sample (e.g. some properties had more than one owner).

A total of 998 usable name and address combinations were compiled for mailing.

⁴ Six other property classifications exist in Fernie: Business/other, farm, light industry, managed forest land, not applicable, recreational/ non-profit,

3.4.3 Survey process

A postcard was mailed to the 998 non-resident property owners from the City of Fernie tax roll. The postcard included a digital image by Fernie artist Keya White, which enhanced its attractiveness. The postcard layout is included as Appendix B. A link on the postcard directed respondents to an online survey (www.fernie.rem.sfu.ca). To increase response rates of the survey, an incentive was provided by Island Lake Resorts in Fernie⁵, and a draw prize was offered to one survey respondent. To ensure confidentiality and avoid multiple responses, each postcard included a unique six digit survey access code which was usable only once.

An initial postcard mail out was sent on June 8th, 2009 with a reminder notice sent on June 29th. Due to budgetary constraints, the reminder notice was sent to Canadian residents only (N=827). 59 postcards were returned as undeliverable for a total of 939 delivered survey postcards. The initial mail out yielded 146 (14.6%) responses and the second mail out yielded an additional 96 responses. Total response rate was 242 surveys (24.2%).

3.4.4 Survey Overview

Survey questions were designed based on thematic issues found in the literature and on achieving the research objectives. Each section of the survey focused on a different theme related to the effects of RTs in Fernie:

- Section 1: Home usage patterns- Explored how RTs use their properties including frequency and season of use, and rental patterns.
- Section 2: Attraction to Fernie- Examined the motivation of RTs for purchasing property in Fernie and their initial attraction to the area.
- Section 3: Community involvement- Looked at how involved RTs are in Fernie events, community groups and activities.
- Section 4: Quality of life perspectives- Explored what quality of life means for RTs in Fernie, and which features and services are most important for maintaining a high quality of life.
- Section 5: Demographics- Contained demographical questions comparable with census data.

A copy of the survey is included as Appendix A

⁵ The incentive was a Weekend Spa Getaway Package at Island Lake Resort worth over \$1000.

3.4.5 Survey Outcome

Of the 998 mailed surveys, 242 were returned with 237 containing usable data. While the geographic traits of respondents generally approximated those of the general population on Fernie's property tax roll, there were some discrepancies. Albertan's (76% of the sample, compared with 65% of the tax roll) were somewhat over-represented, while International (8% of the sample and 12% of the tax roll), and U.S. (2% of the sample and 5% of the tax roll) respondents were especially under-represented (Table 1). Under-representation of USA and International respondents is likely the result non-response call-back notices being sent to Canadian addresses only.

Table 1 - Geographic distribution of survey respondents compared with Fernie tax roll

Place of permanent residence	Tax roll data (N=998) (%)	Survey respondents (n=237) (%)
BC	68 (7%)	13 (5%)
Alberta (not including Calgary)	134 (13%)	51 (21%)
Calgary	522 (52%)	131 (55%)
Rest of Canada	101 (10%)	21 (9%)
United States	53 (5%)	5 (2%)
International	118 (12%)	18 (8%)

3.5 Key Informant Interviews

Key informant interviews were conducted with Fernie stakeholders between December 10, 2009 and January 12, 2010. A total of 23 interviews were completed. The interviews were designed with two objectives in mind:

1. Share results of the RT survey to garner key informant perspectives on the characteristics, behaviours, and preferences of Fernie's RT populations; and
2. Discuss planning and management strategies for addressing challenges and exploiting opportunities of residential tourism to enhance QoL.

As the RT survey targeted non-residents, key informant interviews were important to gain perspectives of permanent residents and community stakeholders in the Fernie area.

3.5.1 Interview Strategy- Interview Guide Approach

Patton (2002) outlines three forms of qualitative interviewing:

1. The informal conversation;
2. The interview guide; and
3. The standardized interview

These methods vary in terms of the degree to which questions are structured. The informal conversation approach is completely unstructured and relies on the spontaneous generation of questions by the researcher. In contrast, the standardized interview consists of carefully worded questions with limited flexibility to alter questions or probe interviewees for further information (Patton, 2002). The interview guide approach involves listing questions or issues to be explored in the interview to ensure similar lines of inquiry between respondents, but allows flexibility to probe and extrapolate based on the experience and knowledge base of the interviewee. The general interview guide approach was used for this study.

Method and data triangulation involves employing different viewpoints and research findings (such as secondary data sources) to confirm interviewer perceptions. Respondent validation suggests that interview respondents be presented with tentative results and given the opportunity to revise their responses (Silverman, 2000). Triangulation (Silverman, 2000) and respondent validation were both used to promote validity of this research.

3.5.2 Interview Instrument

An interview guide was developed (Appendix C) which addresses the research questions and sub-questions of this study. The interview guide questions were reviewed and pre-tested with colleagues at the Centre for Tourism and Policy Research at Simon Fraser University and with two Fernie residents to: ensure comprehensiveness, identify potential areas of misinterpretation, and assess interviewer conduct. Feedback from the pre-testing was incorporated to improve interviewer responsiveness and prompting techniques. Stakeholders ranged from city staff and planners, to developers and non-profit organizations (Table 2).

Table 2 - Distribution of Stakeholders Interviewed

Area of Community Involvement	# of Key Informants
Elected official	4
Non-governmental organization	3
Social service organization	4
Real estate and development	3
Business representative	4
City of Fernie Staff	2
Economic and business development	3
TOTAL	23

Returning to Gill and Williams (2006) tourism-led amenity migration framework (Figure 1- Tourism-led Amenity Migration Framework (Gill & Williams, 2006)), it was important to sample a cross section of stakeholders. These stakeholders play a role in the planning and development processes associated with residential tourism and amenity migration in Fernie.

3.5.3 Participant Selection and Recruitment

Selection of interview participants was based on their involvement with, or interest in, the management of residential tourism in Fernie. Initially, participants were selected based on the the researchers' acquaintances in Fernie. The participant pool was expanded using a snowball sampling technique. Upon completion of each interview, key informants were asked to recommend others that might wish to offer their perspectives. The interview process concluded when no new information was provided. In total 23 key informants provided their perspectives. Table 2 identifies their general affiliation and distribution.

3.5.4 Interview Process

The interview process began with an e-mail solicitation for the key informant to participate in the research project. Once the interviewee agreed to participate, three documents were sent to each participant:

- The interview consent form;
- A copy of the interview guide and questions; and
- A background information package containing a summary of the survey results.

Interview participants were encouraged, but not required to review the above material prior to the interview. Interviews were conducted at locations selected by the participants and included offices, coffee shops, and private homes. Interviews lasted from thirty to fifty minutes. At the start of each interview, the research synopsis was reviewed and participants were asked to sign the research consent form, approved by Simon Fraser University's Office of Research Ethics. Interviews were digitally recorded and transcribed verbatim. Respondents were then re-solicited and given the opportunity to review the interview transcription and modify responses as necessary. Five respondents requested transcripts; one respondent modified the interview transcript.

Respondents were informed of the interactive nature of the interview and were encouraged to answer the research questions and also provide additional perspectives and to create a free-flowing discussion. At times, the interview guide was strictly adhered to, and at other times it was neglected in favour of relevant dialogue.

3.6 Primary Data Analysis

A variety of methods were used to analyze the RT survey responses and key informant interviews. For the survey data, frequency statistics revealed the distribution of the survey responses for variables. In addition, bi-variate analyses including cross tabulation and Chi-square significance tests, were used where appropriate to explore the relationship between variables. Responses to open-ended survey questions were categorized into thematic groups and reported.

Key informant interview responses were analyzed by deconstructing and coding responses for each participant. As this was done, themes began to emerge. Thematically coded responses were then compared to the research questions guiding this study. Such an approach ensured that interview responses were relayed in the context of the overriding research questions.

To avoid 'anecdotalism', which is a common problem in qualitative research methods (Bryman, 1988, p.77; as cited in Silverman, 2000), triangulation and respondent validation were used to promote. Triangulation involves employing different viewpoints and research findings (such as secondary data sources) to confirm interviewer perceptions (Silverman, 2000). This was achieved through review of secondary data and academic

literature. Respondent validation suggests that interview respondents should be presented with tentative results and given the opportunity to revise their responses (Silverman, 2000). Respondents were given the opportunity to review the interview transcription and modify responses.

3.7 Secondary Data Analysis

Secondary data sources were collected between January 2008 and January 2010. Secondary data were used to cross reference key informant responses and provide context during interviews. Secondary data provided context of local issues which helped the researcher obtain more meaningful interview outcomes.

Secondary data were derived from publicly available documents, community planning materials, and online sources. Examples of community planning documents include:

- Fernie's Official Community Plan,
- The Fernie Community Profile and Business Guide,
- Fernie's Housing Needs Assessment,
- Results of Fernie's Economic Development Forum, and
- Fernie's Resort Development Strategy.

The research continuously followed local media sources and news stories by reading council minutes, updates on the City of Fernie website, local newspapers, magazines, local radio, and posters and notice boards around the community. This secondary data examination formed an integral part of this research.

3.8 Study Limitations

Several limitations in this study have the potential to affect the validity and reliability of the results. Limitations of the qualitative interview process and quantitative RT survey are presented to promote the transparency of this research. Limitations include:

- The applicability of this research to other locales. As each community has distinct characteristics, the findings of this study do not represent all tourism communities. Though it can be used for comparisons of similar results.
- Residential tourist survey limitations:

- The survey is limited by its non-inclusion of Fernie's permanent population. Comparisons between RTs and Fernie's permanent population are based on key informant perceptions;
 - Survey reminder notices were sent to Canadian residents, but not outside Canada. This may have biased the responses in favour of Canadian RTs;
 - Part-time residents who rent, as opposed to own, property in Fernie were not captured in the survey;
 - The 24 percent response rate (a 237 person sample of the 998 population) is 95 percent confident, plus or minus 5.6 percent⁶. There is some margin of error with respect to whether survey responses truly reflect Fernie's RT population;
 - The participants and the researcher may have different interpretations of the survey questions;
 - Using an online survey requires respondents to have internet access. This limitation was addressed by offering respondents the option of completing a paper survey. Nobody requested a paper copy of the survey;
 - The motivations, perceptions, and behaviours of RTs are complex and likely influenced by variables beyond the scope of the survey.
- Key informant interview limitations:
 - Although a broad perspective from key informants was sought, interview respondents were not selected randomly. Therefore, the narratives expressed in this research may not sufficiently address the perceptions of all individuals in Fernie;
 - The small sample size (n=23) and single-case study approach prevent generalizations regarding successful planning processes;
 - While efforts were made to ensure that key informants had a clear understanding of the interview questions, it is possible that questions and/or key informant responses were misinterpreted. To reduce the possibility of misinterpretation, key informants were given the opportunity to review and modify interview transcripts;
 - Patton (2002) asserts that all qualitative research is infused with bias, which reduces reliability. The reiterative nature of the interviews, coupled with a sampling of broad perspectives in Fernie worked to reduce bias. However, some bias is inherent in all qualitative research (Patton, 2002).

⁶ Determined by using online sample size calculator: <http://www.surveysystem.com/sscalc.htm>

CHAPTER 4- RESEARCH FINDINGS AND ANALYSIS

4.1 Introduction

This chapter presents the main findings emanating from the study's key informant interviews and residential tourist (RT) survey. The findings help answer this study's four primary research questions:

1. What are the socio-demographic and behavioural characteristics of RTs in Fernie?
2. What factors affect quality of life for Fernie's residential tourists?
3. How do community stakeholders perceive the effect of residential tourism on quality of life in Fernie?
4. What are the policy and planning implications of residential tourism's affect on the QoL in Fernie?

First, a socio-economic profile of Fernie RTs responding to the study's online survey is presented. The second section describes several of the critical quality of life attributes deemed to be important to Fernie's RTs. Next, the perspectives of community stakeholders are used to identify perceptions of how residential tourism affects quality of life in Fernie. Finally, using a combination of data gathered from the survey, secondary document review, and community stakeholder perceptions, the findings identify potential planning and management strategies to enhance residential tourism contributions to Fernie's overall quality of life.

4.2 Residential Tourist Profile

RTs profiled in this survey were drawn from a sampling frame of Fernie property owners listed in the BC Assessment Authority's 2009 property ownership database.

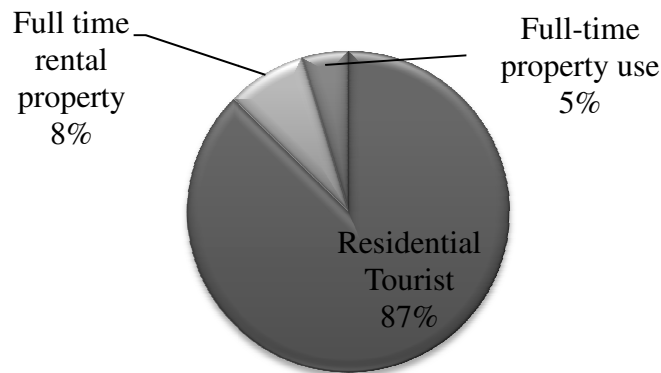
Qualified RTs were Fernie property owners who:

1. Owned a residential property in Fernie;
2. Permanently resided outside the Fernie area; and
3. Used their Fernie property on a part-time basis (weekends, holidays, summer season, etc.).

Based on the first two criteria, about 37 percent of Fernie's property owners were considered to be RTs. All of them were asked to participate in this study's on-line survey. Overall 237 or 24 percent of them completed and returned the survey instrument. Based on their survey responses, 207 or 87 percent of the respondents met all three qualifying

criteria. A few (19) rented out their properties year round, and 11 other respondents indicated they used their property year round despite having a primary home address listed beyond Fernie (Figure 7).

Figure 7- Qualified Residential Tourists



The majority (81%) of the responding RTs were from Alberta, with the largest proportion (60%) originating in Calgary. These respondent proportions were biased more heavily towards non-Calgaricians than was evident in the BCAA data for Fernie. Generally, the distribution of BCAA non-permanent Fernie property owners was less Alberta-centric than that of the on-line survey respondents (Table 3). The fact that survey reminder notices were not sent to U.S. and International property owner’s helps explain this bias.

Table 3- Permanent Residence of Qualified Residential Tourists

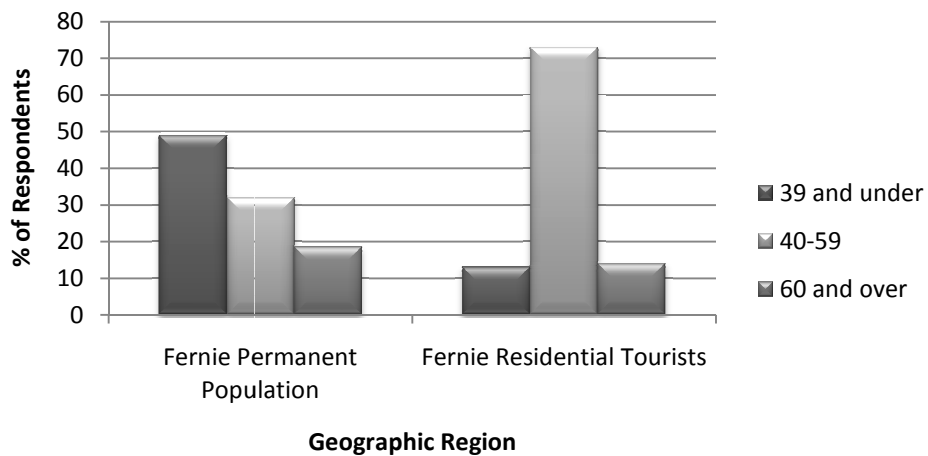
Place of permanent residence	Tax roll data (N=998) (%)		Qualified Residential Tourists (n=207) (%)	
	#	%	#	%
BC	68	7%	6	3%
Alberta (not including Calgary)	134	13%	43	21%
Calgary	522	52%	125	60%
Rest of Canada	101	10%	13	6%
United States	53	5%	4	2%
International	118	12%	6	8%

4.2.1 Demographic Characteristics

Overall, RT respondents tended to be wealthier, older and more educated than their permanent resident counterparts when compared with 2006 census data. Much of this wealth was associated with employment in resource industry jobs.

From a demographic perspective, the RTs were almost equally distributed between males (52%) and females (49%). In general, RTs were older than their Fernie permanent resident counterparts, For instance, 87 percent of the RTs were over 40 years old compared to only 51 percent for Fernie permanent residents (Figure 8).

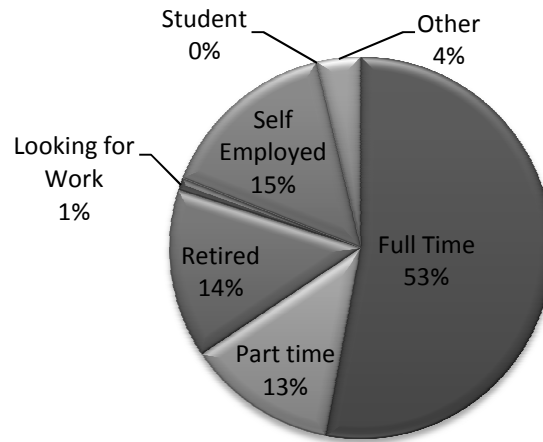
Figure 8- Comparison of RT Respondent age distribution with Fernie residents



There were also differences between RTs and permanent residents with respect to the type of homes owned in Fernie. Fernie permanent residents (63%) were more apt than RTs (43%) to own single family homes. The remaining proportion of RTs (57%) resided in townhouses, condominiums, and apartment buildings. A lower percentage (37%) of Fernie residents resided in such dwellings.

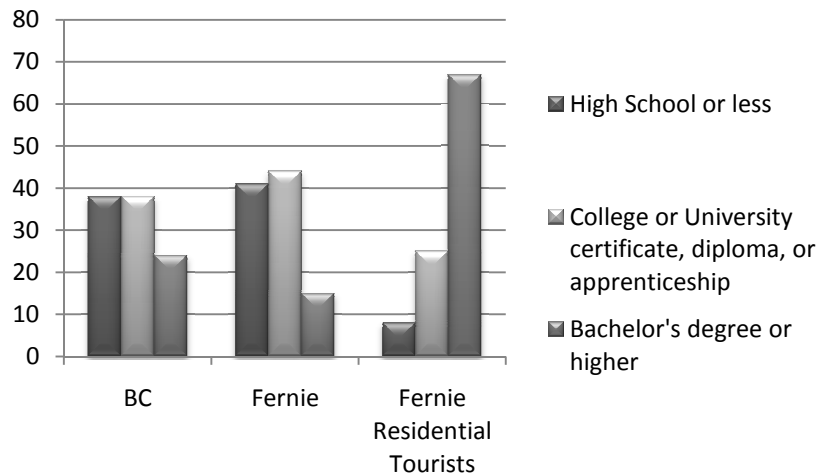
A slight majority of the RTs (53%) in the survey were employed full-time while another 13 percent were employed part-time, and 14 percent were retired (Figure 9). Of those RTs who were employed full-time and part-time (66%) over a quarter (27%) worked in resource industry jobs (e.g. oil and gas, mining, etc.). Comparatively, 87 percent of Fernie's population was employed, and 13 percent held resource industry jobs (BC Stats, 2009).

Figure 9 - Employment Status of Fernie RTs



RT survey respondents reported higher education and income levels than the average permanent Fernie residents. About two-thirds (67%) of RTs held a bachelor's degree or higher. This proportion was much greater than that for Fernie's permanent population (12%)⁷ (Figure 10).

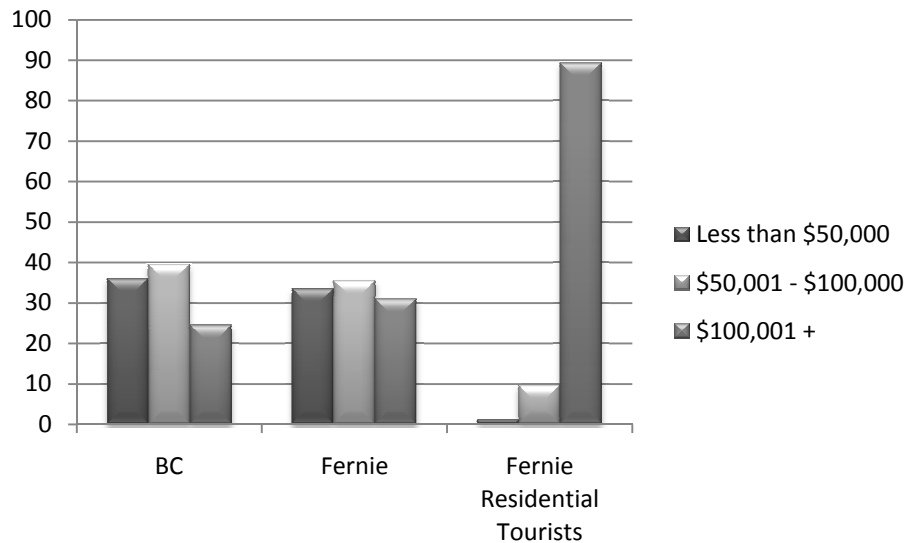
Figure 10- Comparison of RT educational attainment levels with Fernie permanent population



⁷ Includes those aged 25-64

Overall, the vast majority (88%) of RTs reported having annual household income of over \$100,000. Comparatively, only 31 percent of Fernie residents had family household incomes above \$100,000 in 2006 (Figure 11).

Figure 11- Income distributions in BC, Fernie and Fernie RT populations

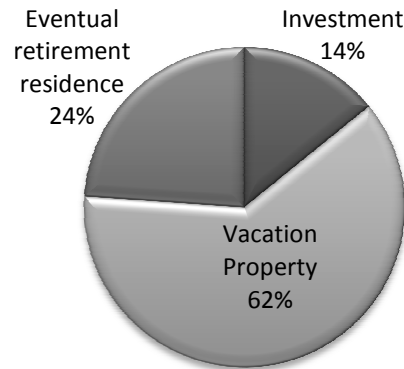


Further to Figure 11, about 43 percent of RTs claimed household incomes greater than \$200,000. These incomes are not comparable with Fernie’s population as the census statistics do not go beyond \$100,000. The wealth of RTs was further illustrated by their levels of multiple home ownership. About 38 percent of them owned vacation properties in addition to their Fernie home and permanent residence.

4.2.2 Property Purchase Motivations

Three survey questions probed RT property purchase motivations. The first question sought to determine whether RTs purchased their property as an investment, vacation home, or retirement residence. The majority (62%) considered their Fernie property to be a vacation home. Only 24 percent of them had purchased their property as an eventual retirement residence, and another 14 percent considered these houses to be primarily investment assets (Figure 12).

Figure 12- Primary motivation for property purchase by RTs in Fernie



n= 205

Second, the survey explored the relationship between initial attraction to the Fernie area, and property purchase decision. This question was designed to determine the influence of previous tourism visits on property purchase decision; the tourism-migration transition proposed by Stewart (2000), Gill (2008) and other. Survey respondents were asked: “Prior to purchasing your Fernie property, what initially brought you to the Fernie area?” Table 4 summarizes the most popular attractants for RTs prior to purchasing a property in Fernie.

Overall, 75 percent of the sample was initially attracted to Fernie by recreational tourist activities (e.g. skiing, camping, biking, fishing, etc). The vast majority (68%) visited Fernie on a downhill skiing holiday prior to purchasing their property. Few respondents (7%) claimed to have purchased a property without first visiting Fernie as a tourist. However, several were initially attracted by non recreational tourist amenities such as: visiting friends and relatives (23%), Fernie was recommended to them by someone (17%), or because they were passing through on their way elsewhere (13%).

Table 4- Initial attraction to Fernie area prior to purchasing property

Attraction to Fernie area*	# of respondents	% of Total
Downhill skiing	141	68%
Visiting friends and relatives	47	23%
Fernie was recommended to me by a friend or relative	36	17%
Passing through on my way elsewhere	26	13%
Biking trip	26	13%
Camping	23	11%
Golfing trip	18	9%
Other	17	8%
I did not visit Fernie prior to purchasing my property	14	7%
Hiking trip	13	6%
Visiting Lakes	9	4%
Fishing trip	7	3%
River sports (kayaking, canoeing)	6	3%
Business travel	4	2%
Cat skiing holiday	4	2%
Arts and cultural event/ attraction	2	1%

*Respondents were permitted to select multiple activities (n=393)

The third question exploring property purchase motivation asked respondents to rate the importance of 20 factors in their decision to purchase property in Fernie. Overall, they indicated that the most influential attributes were the area's natural scenery (3.59) and proximity to a ski resort (3.57) (Table 5).

Overall, natural attractions such as the scenery, built attractions such as the ski resort, and a healthy environment were the most important attributes for RTs purchasing property in Fernie. However, socio-cultural attributes such as: high quality of life, mountain culture, and small town atmosphere were also important. Fishing opportunities and golf courses, which are significant attractions for Fernie's summer tourists, were not nearly as critical to them. Potential job opportunities were markedly the least important factor.

4.2.3 Property Use

Various survey questions examined the property use patterns of Fernie's RTs. Overall, almost two-thirds of them (64%) used their Fernie homes between 30-129 times

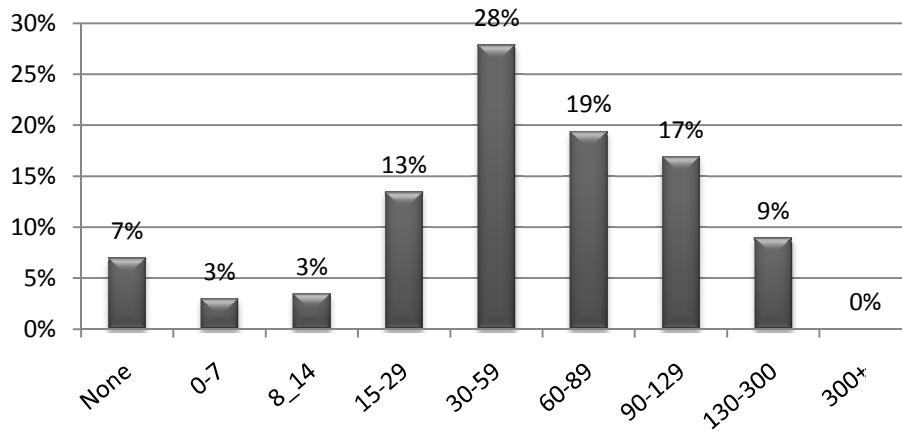
annually. The most frequently mentioned usage level (28%) was between 30 and 59 days a year (Figure 13).

Table 5- The importance of Fernie attributes in property purchase decisions of RTs

Fernie Attributes	Score (out of 4)
Natural scenery	3.59
Proximity to ski resort	3.57
Healthy environment	3.23
High quality of life	3.20
Mountain community culture	3.14
Small town atmosphere	3.11
Hiking trails	3.11
Friendliness of community	3.06
Safe community/ neighbourhood	3.06
Climate	3.04
Sense of community	2.83
Mountain biking trails	2.78
Proximity to lakes	2.65
More affordable than other mountain resorts	2.63
Proximity to permanent residence	2.63
Historic downtown	2.53
Golf courses	2.37
Proximity to friends and family	2.17
Fishing opportunities	2.16
Job opportunities	1.21

Scale: 1= not at all important, 2= somewhat important, 3= important, 4= very important).

Figure 13- Distribution of Annual Fernie RT Property Use Days



Respondents were also asked to estimate the number of days per season that their property was occupied, including personal use and by friends and family. On average RT properties were occupied as vacation residences for 65 days or 19 percent of the year. On average, RT homes were occupied by 3.9 people (including friends and family) for those 65 days. This was higher than the Fernie (2.2) and BC (2.5) average persons per household (BC Stats, 2009). The summer months of July and August generated the largest proportion of annual occupancy (31%). RTs occupied their homes an average of 19 days during this period. The winter ski season (December to March) was also a popular visitation time for RTs. They used them an average of 26 days over that season (Table 6).

Table 6 - RT Property Occupancy by Season

	Number of Days in Season⁸	Average number of use days/ season	Percentage of Season occupied
Winter (Dec.- March)	120	26.1	21.8
Spring (Apr.-June)	90	9.5	10.5
Summer (July/ August)	60	18.7	31.2
Fall (Sept.- Nov.)	90	10.4	11.6
Total	-	64.7	18.8

4.2.3.1 RT Property Rental

Of all RT respondents, 52 (or 25%) claimed some level of property rental. Rental use included both secondary suites and as well as leasing entire homes when the RTs were not in Fernie. Of the 25 percent who rented, the average number of rental days for the year was 154, and the highest proportion of rentals occurred in the summer season (July and August) when RT properties were occupied by renters for 26 days (47% of the season) (Table 7).

For those RTs who did not rent their home (75%), various ‘rental barriers’ were identified. The most important reason for not renting was that the property was ‘used often enough that renting was not an option’ (30%). However, other RTs:

- Preferred the flexibility of using the property when convenient (17%),

⁸ Note: number of days in season, and percentage of season occupied are approximations based on 30 days in each month of the season.

- Did not want other people to occupy their home (18%), or
- Had no financial interest in renting (15%).

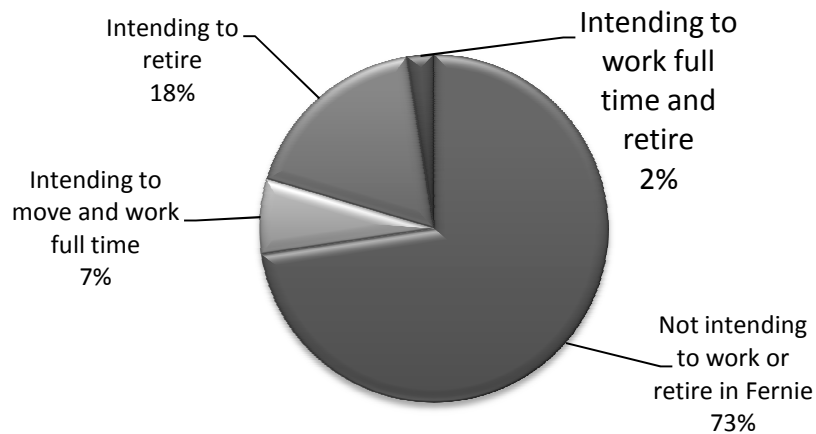
Table 7- RT Rental Occupancy by Season

	Number of renters	Average number of rental days (renters only)	Percentage of season rented⁹
Winter – (Dec.- March)	52	55.0	45.9%
Spring (Apr.-June)	36	34.7	38.6%
Summer (July/ August)	36	28.1	46.8%
Fall (Sept.- Nov.)	37	35.8	39.8%
Total per year	-	154	-

4.2.3.2 Intended Future Use

Survey respondents were asked to state the ‘intended future use’ for their Fernie property. The majority of respondents (80%) were planning to either maintain or increase the current use of their Fernie home. Only, 2 respondents (1%) had intentions of decreasing use, and another 1 percent planned to sell their Fernie property and buy elsewhere. Twelve percent (24 respondents) planned to sell their home and buy another property in Fernie. A sizable proportion (27%) of RTs had future intentions of moving permanently to Fernie, either to work or to retire (Figure 14).

Figure 14- Residential Tourists intending to move permanently to Fernie



⁹ Approximated by dividing winter average by 120, summer average by 60, and spring and fall averages by 90.

4.2.4 Community Involvement

Various survey questions probed the degree to which RTs were involved in Fernie’s community affairs. One question asked respondents how they found out about community events and activities in Fernie. Most (72%) discovered by reading Fernie’s monthly magazine - The Fernie Fix. Sizeable proportions found out about local events through: the internet (52%), word of mouth (52%), posters located around the town (47%), and the local newspaper (45%).

The majority of Fernie’s RTs (80%) indicated that they were not involved in any Fernie community groups. Of those that were engaged in local groups the largest proportions were involved in:

- Outdoor clubs (hiking, biking, nordic skiing, etc.) (n=11),
- Fernie Alpine Ski Team (n=9), and
- Church groups (n=8).

Many RTs had attended community events (64%) and sporting events (48%) in the last 12 months. However, in the same 12 month period, few respondents had:

- Volunteered (10%),
- Worked for a local business (3%), or
- Attended a council meeting (2%) (Table 8).

Table 8- RT Involvement in Community Activities in the last 12 months

Community Involvement	# of Respondents	% of Respondents
Attended a community event	130	64%
Attended a sporting event	97	48%
Attended a neighbourhood activity	69	34%
Attended another community activity	31	15%
Volunteered in the community	20	10%
Worked for a local business or other organization	7	3%
Attended a council meeting	4	2%
Voted in Fernie’s municipal election	0	0%

Respondents were permitted to select multiple activities (n=358)

Two questions sought to further understand RT reasons for not participating more in Fernie events and activities. First, respondents were asked in an open-ended question

to “Specify any arts, cultural, or recreational activities you would like to see offered in Fernie?” Overall, 69 responses were provided by the survey sample (Table 9).

Table 9- Arts, cultural and recreational activities which RTs would like to see in Fernie

Theme	# of Respondents
Art exhibits, events, activities, theatres, etc.	18
Music concerts and festivals	15
Golf course development	8
Family oriented activities (children, seniors, etc.)	7
Downhill skiing events/activities and development	6
Biking events/activities and development	6
Hiking events/activities and development	5

Most respondents (18) were interested in art exhibits, events, and theatres, or increased music concerts and festivals (15). Several responses alluded to the need for Fernie to cater its recreational offerings to an aging population.

The survey also probed reasons for not participating more often in community groups, events and activities. The most frequent reason for non-engagement was ‘limited time spent in the community’ (66%). Other participation constraints related to: limited availability of time (27%), commitments to activities in their primary residence communities (21%), and a philosophy that Fernie was solely a place for ‘vacation time’ (19%).

4.2.5 Residential Tourist Quality of Life Amenities

Three thematic questions probed the meaning of QoL for RTs. The first question asked RTs to “Describe what a good quality of life in Fernie means for you? Overall, about 175 responses were provided by the RTs. Their voluntary responses were categorized and are presented in Table 10.

The largest proportion of RTs identified environmental attributes including the natural environment (45%) and outdoor recreation (41%) most frequently as important Fernie QoL attributes. Clearly, RTs enjoyed Fernie’s friendliness (37%) and small town

atmosphere (27%). The following remarks by survey respondent help emphasise the dimensions of what contributes to Fernie’ QoL:

“A town that’s small, safe, friendly and inviting in a beautiful natural setting, with a range of accessible activities both recreational and cultural”

“Small town feel, slow pace of living”

“Friendly people, good food, outdoor activities, unique shopping”

Table 10 - RT ‘top of mind’ Fernie quality of life attributes

Quality of Life Theme	Number of responses	% of Respondents
Natural Environment (Natural scenery, clean air, clean water, etc.)	79	45%
Outdoor Recreation (hiking, biking, skiing, etc.)	72	41%
Friendliness	65	37%
Small town	47	27%
Safety and security	40	23%
Amenities (Restaurants, shopping, etc.)	36	21%
Relaxation	33	19%
Community Culture (Downtown, culture)	33	19%
Clean Town	14	8%
Social Services (health care, housing, etc.)	10	6%
Family	7	4%

A second set of questions explored RT perspectives on the importance of a range of specific amenities to their quality of life in Fernie. Overall 36 amenity features were rated in terms of importance to their experiences in Fernie. Table 11 displays the collective mean scores for each amenity. The overall mean score was 3.97.

Table 11- Rated Importance of Fernie Amenities

More Important (>3.97)			Less Important (<3.97)		
1	Drinking water quality	4.87	21	Planning and zoning regulations	3.94
2	The natural scenery	4.83	22	Arts and culture	3.85
3	Recreation Trails	4.78	23	Housing affordability	3.80
4	Safety and security	4.70	24	Shopping and retail options	3.79
5	Ski resort	4.66	25	Traffic and congestion	3.77
6	Parks and protected areas	4.58	26	Types of development	3.67
7	Appearance of the town	4.56	27	Library	3.67
8	Health care/ hospitals	4.56	28	Agricultural land protection	3.62
9	Walkability	4.49	29	Economic diversification	3.61
10	Recycling	4.43	30	Rate of community growth	3.60
11	Police protection	4.41	31	Local food production	3.55
12	Recreational facilities	4.37	32	Golf course	3.41
13	Small town atmosphere	4.37	33	Services for the disabled	3.22
14	Habitat for wildlife	4.36	34	Education opportunities	2.33
15	Community sidewalks	4.33	35	Public Transportation	2.25
16	Sense of community	4.22	36	Child care	1.93
17	Vibrant downtown	4.15			
18	Road maintenance	4.09			
19	Garbage disposal	4.06			
20	Events and festivals	3.99			

(Scale: 1=unimportant, 2=somewhat unimportant, 3=in the middle, 4=somewhat important, 5 = important)

Overall environmental amenities emerged as being especially important in terms of their importance to quality of life for Fernie’s RTs. For example drinking water quality was ranked first, followed by natural scenery (2nd), and recreation trails (3rd). Parks and protected areas ranked sixth. Many socio-cultural amenities fell in the middle of the list. These included: small town atmosphere (13th), sense of community (16th), events and festivals (20th), and arts and culture (22nd). Economic and development factors, including rate of community growth (30th), economic diversification (29th), and types of development (26th) were of lowest importance. . Interestingly, social amenities associated with longer term stay in the community were rated as being of minor importance. These included: child care (36th), public transportation (35th), and education opportunities (34th).

Respondents were also asked to rate their satisfaction with the quality of these amenities in Fernie. The importance and satisfaction rating of each amenity was computed via an importance-satisfaction analysis (ISA) described on page 73.

Residential Tourism and Fernie's Quality of Life

This section address the primary research question: "How do community stakeholders perceive the effect of residential tourism on quality of life in Fernie?"

Specific questions related to this theme include:

- a) How do residential tourists shape the socio-cultural attributes of Fernie?
- b) How do residential tourists affect Fernie's landscape and environmental attributes?
- c) How is residential tourism transforming Fernie's economy?

These questions are answered by analyzing specific survey results and summarizing the perspectives of community stakeholders in Fernie emanating from the key informant interviews.

4.3.1 RTs Influence on Fernie's Socio-Cultural Attributes

Key informant responses were quite varied with respect to the impacts of RTs on Fernie's socio-cultural fabric. This section first explores the perceived socio-cultural benefits of residential tourism as portrayed by key informants. It then elaborates on the most significant effects that these informants highlighted in their remarks: community tensions, community involvement, home occupancy, and housing prices.

Overall, key informants believed that RTs brought a range of benefits to Fernie. These largely revolved around the introduction of new ideas and perspectives, that translated into a more vital and diverse set of community amenities. Three informants articulated this benefit well: eclectic

"[RTs] improve...the eclecticness of the community. Amenities, culture, restaurants, night life, arts scene...we have these because of residential tourists fuelling the demand for a variety of local services." (Key Informant 4)

"They add colour, they add more life, more character, more depth." (Key Informant 16)

“...they have new and diverse views and preferences, Fernie... benefits with respect to the amenities, social services, retail and entertainment options available. All of which enhances the social fabric and diversity of the community.” (Key Informant 17)

Clearly RTs add a diversity of tastes, purchasing power, interests, and viewpoints to the community of Fernie. These in turn led to an enhanced quality of retail and food options, as well as recreational amenities and social services. Two informants also pointed to the quality of sporting organizations influenced by RT involvement. One key informant indicated that RTs benefit the Fernie Alpine Ski Team (FAST) as “...they represent the majority of membership and make the team world class, with world class coaching” (Key Informant 2).

4.3.1.1 Community Tensions

While new ideas and perspectives were felt to be critical benefits from residential tourism, there was also a feeling that cultural differences between them and permanent residents had led to localized tensions. Several key informants remarked on past tensions, or resentments, between permanent residents and new RTs. One respondent stated that “there are locals who don’t treat them (RTs) well and don’t make them feel welcome” (Key Informant 14). However, overall they felt that there was a marked improvement in relations between permanent residents and RTs over the last decade. One informant described this progression:

“I think tensions are there, but it is less than it was 11 years ago. Then you had the old timers cursing out the new people. It’s still there, but I think less now...there has been a 10 year acceptance period.” (Key Informant 4)

The primary root of tensions between locals and RTs stems from resentments concerning the availability of affordable housing issues. That is, residents perceived that RTs were purchasing Fernie properties and driving up the cost of housing.

Alternatively, one informant depicted the community’s tensions as a product of the community’s fear of change:

“The biggest negative impact is fear and unknown...fear and unknown creates tension and misunderstanding and is putting stress on the social fabric of the community.” (Key Informant 6)

As Fernie continues to transition towards a tourism and service-based economy, RTs, and new amenity migrants are increasingly being accepted as important members of the community

4.3.1.2 Community Involvement and Engagement

Key informants suggested that Fernie’s RTs held significant knowledge and ideas that could be shared with Fernie’s community. However, if RTs were not engaged in Fernie activities those ideas would not be disseminated to the benefit of the community. The perception of key informants was split amongst those who saw RTs as very involved and contributing members of the community, and those who perceived RTs as uninvolved and disinterested in community affairs. Two responses captured the essence of this dichotomy:

“They get involved... [T]hose that have become community drivers, many fall into that category [they were previously RTs]; they have made the leap and now make a significant contribution to the community. They volunteer...a large portion of RTs get very involved.” (Key Informant 6)

“...they aren’t involved. The tax dollars and money they spend when they are here...don’t really contribute to the fabric of the community. The fabric of the community is made up of more than just tax dollars and grocery money... [it] is made up of people who volunteer and get involved in community issues. The higher the number of RTs, the lower the overall quality of life is for people that call Fernie their home and want to contribute to a strong sustainable community.” (Key Informant 21)

The reality was that RTs in Fernie exist along a spectrum of engagement levels. On one side were RTs who purchased a home in a residential neighbourhood with intentions to live permanently in Fernie. They tended to be very involved in the community. On the other side were those who purchased their property as a vacation

home and were less interested in becoming involved locally. One informant described this non-engaged faction of RTs:

“I know many people that come to Fernie and don’t speak to their neighbours. They come here to have an escape and a getaway from their urban existence...they treat their residence as a cabin...I’m not sure you will reach these people with outreach, because I don’t they think they want to be engaged.” (Key Informant 21)

Regardless of whether respondents perceived RT community involvement as high or low, there was general agreement that the community should strive to further engage and get them involved in community affairs. Moreover, many key informants felt that Fernie had performed poorly when it comes to engaging the RT population. Two respondents outlined this shortcoming:

“...they are well educated successful people and the challenge we have is to somehow hook into their expertise and life experiences and bring those benefits to the city...there is a lot of experience and expertise that we could use.” (Key Informant 23)

“They bring a wealth of experience and education...It’s valuable to have people with time, who are educated and experienced. It’s a valuable resource. I think we could tap into that more than we do.” (Key Informant 19)

The various constraints to RT involvement (page 56) have made it difficult to effectively engage and involve them in the community. Key informants offered many ideas for overcoming these challenges. Their approaches are discussed on page 89.

4.3.1.3 Home Occupancy

Key informants perceived the most significant negative impact of residential tourism as the loss of sense of community with unoccupied homes; the ‘cold bed’ phenomenon. Some informants perceived the low levels of home occupancy, particularly during mid-week, and shoulder season, as a detriment to the quality of life in Fernie. Two informants articulated this problem well:

“My daughter lives in...[a] building [that] is virtually empty. This is a detriment to some neighbourhoods. It’s a darkened community; there is no life in the neighbourhood, no kids in the street.” (Key Informant 15)

“...we have areas of town that are dark and not conducive to neighbourhoods...This takes away from our sense of community.” (Key Informant 9)

Socially, key informants felt a community loss as some areas of the City include high proportions of RTs who do not reside permanently. However, depending on one’s circumstances, low occupancy was perceived as a benefit. Although these views were the minority, they were worth mentioning. For example, one respondent stated:

“Personally, I enjoy my apartment building more because fewer people are in my building. I would [enjoy] living there less if there were more people and traffic in the building.” (Key Informant 3)

Overall however, there was a sense amongst key informants that increasing the occupancy of RT homes, and thereby enhancing sense of neighbourhood and community, was a desirable venture. Options for achieving this goal are discussed on page 82.

4.3.1.4 Fernie’s Housing Market

RT home development is a prominent economic contributor in Fernie. Between 1999 and 2005, 552 new housing starts occurred in Fernie. The large majority of these houses were developed for residential tourists wishing to own vacation homes in the City (Pringle & Owen, 2006; City Spaces Consulting, 2007; City of Fernie, n.d.). The cost of housing also increased dramatically over the past decade and a half. Since 1993, the average price of a single family home increased 436 percent (from \$54,571 in 1993 to \$292,749 in 2005) (City of Fernie, n.d.). A portion of the increase in housing cost is likely due to broader economic trends, but key informants generally agreed that residential tourists influenced the escalating housing prices. This has created challenges in affordability for many other segments of the Fernie population. The *Affordable and*

Attainable Housing Strategy (City Spaces Consulting, 2007) identified a need for affordable housing in Fernie, especially for:

- Low income individuals and families;
- Seniors;
- First-time homebuyers; and
- Seasonal workers.

Many key informants identified increased housing costs as having an overall negative effect on the community. Informants identified three significant negative impacts of the high cost of housing in Fernie. Two were the displacement of permanent residents and the inability of young families to purchase homes:

“They (RTs) purchase smaller houses and take them out of the market, so there is less of that available for people that can only afford in that range.” (Key Informant 8)

“My friends...can’t afford to live here on one income. They worked their whole life, had a kid and now they can’t afford to live here without working full time, 2 people. So, they moved out of town.” (Key Informant 4)

Key informants also suggested that housing challenges affected the ability of local businesses to retain employees. Two key informants who represent large employers in the Fernie area stated that employee retention was an issue due to the cost of housing. One said:

“Potential employees who find Fernie an attractive community can’t afford to buy and settle in Fernie. We’ve had people in the past who because they couldn’t find a residence...that was attainable in Fernie, they’ve declined employment...These are the people who were looking for the mountain culture atmosphere.” (Key Informant 21)

Another stated that:

“Many potentially good employees leave because they can’t afford to live here.” (Key Informant 3)

In contrast to the negative effects, some respondents saw the housing price increase as creating economic opportunities for Fernie residents:

“People say [someone] couldn’t afford to live here, they left...in reality, their house became worth \$400,000 so they sold their house and bought one in Cranbrook for \$250,000 and augmented their retirement fund...that isn’t displacement, its economic opportunism.” (Key Informant 6)

Whether people are moving away from Fernie because they cannot afford the market, or because they have cashed in on economic opportunities, it was clear that RTs and their influence on housing costs influenced Fernie’s population. Over the last decade and a half Fernie’s permanent population declined, while the part-time RT population increased. However, for long time residents with no intentions of leaving Fernie, the housing prices had little effect:

“...for those that remain here and are planning to stay, the housing prices didn’t do a thing...It doesn’t make any difference to me [what the cost of housing is] because I’m not going anywhere, I’m not selling, I’m here for the long term.” (Key Informant 17)

Overall, most informants recognized the need for affordable and attainable housing options as a way to retain young families and potential employees in Fernie.

4.3.2 Fernie’s Changing Economy

This section addresses the research sub-question: “How is residential tourism transforming Fernie’s economy?” Two primary themes are explored: Fernie’s transition to a resort-based economy, and the influence of residential tourism on the retail and service sectors in Fernie.

4.3.2.1 Fernie’s Diverse Economy

Historically, Fernie’s economy has revolved almost entirely around resource extraction, particularly mining. Mining is still an important job generator in the Fernie area with five operating coal mines in close proximity to the town. These mines employ

2800 people in the Elk Valley and 402 in Fernie (Key Informant 21). However, Fernie's economic base is now more diversified with the most prominent occupations being sales and service (25%), construction and trades (24%), business and finance (13%), and primary industry jobs (9%) (BC Stats, 2009).

Fernie's first ski hill, Fernie Snow Valley, opened in 1963. The hill was purchased by Resorts of the Canadian Rockies (RCR) in 1997 and has since undergone significant expansion. RCR employs 150 people full time. This number increases to 600 individuals during the winter ski season. The majority of employees reside in Fernie (Key Informant 20). Fernie also has substantial employment in: forestry, public services, and retail; giving the city a very diverse economy. One informant metaphorically describes this diversity as a stool with many legs:

"Fernie is fortunate with its economic diversification. Most communities don't have that... [we] have tourism, mining, forestry, the public sector. There are so many legs that if one falls off, or is hurting, the other legs can pick up the slack." (Key Informant 14)

4.3.2.2 The Resource to Resort Economy Transition

Since RCR's purchase of Fernie Alpine Resort (FAR) in 1997, Fernie's economy has shifted from being primarily resource-based to a tourism and service-based economy. As tourism destinations mature, the contributions of traditional tourists are often complemented by jobs in the construction and development of RT properties, and the spending of RTs in the community. In some mature resort areas, residential tourism, including the construction, sale, and development of recreational properties can surpass tourism as the key economic driver. Unquestionably, RTs play a significant role in shaping Fernie's economy. As one key informant emphasized:

"I don't think most local residents realize to what extent their livelihoods and the economy are dependant on residential tourists." (Key Informant 3)

Fernie's labour force statistics have shown an increase in construction employment since 1996. This employment increased from 125 people in 1996 to 225 (8%

of the labour force) in 2006 (BC Stats, 2009). Key informants felt that much of this escalation is due to RT-related construction jobs in Fernie.

RT-related jobs have diversified Fernie's economy. One informant expressed that "Fernie is seasonal, construction offers spring, summer, and fall employment" (Key Informant 6). Most key informants agreed that numerous construction industry jobs were created as a result of residential tourism development; for renovations and upgrading of existing homes, and also for the construction of new homes. Between 1999 and 2005, 552 new housing starts occurred in Fernie. The vast majority (if not all) of new housing starts were targeted for recreational property buyers (City Spaces Consulting, 2007; City of Fernie, n.d.). RTs also spend significantly on renovations and upgrades to homes. One key informant suggested that RTs are the main source of income for many building and repair stores in Fernie: "they support repair people, building supply and renovation stores to an extent that they support these" (Key Informant 18). RT spending however goes far beyond construction and renovations to homes. The spending habits of RTs play a significant role in shaping Fernie's retail and service industries.

4.3.2.3 *Fernie's Retail & Service Industry*

Fernie's retail and service sectors are perceived by key informants to be both highly influenced by, and highly dependant on residential tourism. RTs support many local retailers including: clothing stores, restaurants, grocery stores, coffee shops, and specialty stores. The effect they have is articulated well by one key informant:

"They (RTs) enhance and enlarge the entertainment, food and beverage, retail and recreational offerings that we have to enjoy in Fernie. I don't think we'd have the same level of quality of food and beverage [without them]...the local population wouldn't support that level of quality and diversity." (Key Informant 22)

To a large degree, RTs have sustained much of the retail and service industry offerings in Fernie. One informant confirmed that "they support many of the local businesses and without them there would be quite a negative impact on local business" (Key Informant 15). Another informant identified that RTs have higher service

expectations; and as a consequence the service industry has lifted its standards to meet those expectations, to the benefit of all residents:

“Locals might be content with the restaurants, but RTs are looking for a different kind of service, so that creates a more varied level of services, restaurants, infrastructure, retail...” (Key Informant 12)

In addition to supporting existing businesses, RTs have stimulated new business opportunities for local residents. One informant observed: “[A]...business...just opened where people will take care of everything [for RTs]: grocery shopping, buying stuff, everything” (Key informant 11).

In light of the economic benefits to Fernie’s retail and service industries, some key informants also identified challenges. As the diversity of retail offerings are increased, so too have the prices paid for those services. An informant identified this as an “...economic challenge for people who work here...trying to keep up with rising costs of living, food, services” (Key Informant 2). Another informant suggested that some businesses now target RTs specifically, to the detriment of the permanent population:

“...the retail industry, food, clothing...it’s geared towards that market [RTs]. It ... [is a] negative impact for people that live here.” (Key Informant 1)

Unoccupied homes are mentioned in other studies as having significant negative economic impacts. Business can suffer as fewer people live permanently and spend money in the community. However, this did not surface as a key economic impact in Fernie (although it was perceived as a social impact). Somewhat related however, an informant identified the difficulties of operating a Fernie business with the cyclical nature of residential tourism:

“...they support the retail, food, beverage, and cultural sectors, but not on a full-time basis. You get peak seasonality which is hard for business cycles. It’s hard for business to survive with that.” (Key Informant 22)

From this perspective, economic benefits of RT spending contribute much like that of the tourism industry with cyclical patterns and distinct peak and shoulder season demands. In sum, RTs have significant positive impacts on Fernie's business and retail industries. The key informants agreed that RT developments supported existing businesses, stimulated new business opportunities, and enhanced the quality of retail offerings which benefited the overall quality of life in Fernie.

4.3.3 Fernie's Natural Environment

This section addresses the research sub-question: "How does residential tourism affect Fernie's landscape and environmental attributes?" The environmental impacts and benefits of residential tourism were not a widely discussed topic in the key informant interviews. Few key informants identified any environmental costs or benefits. However, some informants perceived RTs as holding strong environmental values, while others observed some negative impacts associated with RT property development in Fernie.

4.3.3.1 Importance of Environmental Attributes for Residential Tourists

It has been hypothesized that RTs are attracted to areas of high environmental quality, and therefore bring with them strong conservation and environmental ethics to host destinations. The importance of environmental attributes to the quality of life (QoL) of RTs in Fernie was apparent in the survey results. Their responses spoke to the high value they placed on the environment (see page 57). Overwhelmingly, the natural environment in Fernie was the most important contributing factor to the QoL of RTs

4.3.3.2 Perceptions on the Environmental Values of RTs

Key informant perceptions were mixed as to whether they perceived RTs in Fernie to be environmentally conscious. One informant described how RTs, due to the high value they placed on Fernie's environmental assets, transferred those same values to long time residents:

"Residential tourists help us realize the value we have in natural amenities: hiking, biking, trails...we have taken these things for granted. RTs help us understand the value of these assets." (Key Informant 9)

Another informant alluded to the potential effect of RT environmental values on the future role of Fernie's traditional resource extraction industries:

“They [RTs] come for recreation and natural splendour, and many of them probably aren't aware that there are five operating coal mines in the valley. [RTs]...could place significant political pressure against coal mining...We haven't had full scale opposition to [coal] operations, but the potential is there.” (Key Informant 22)

Two informants were less convinced that RTs are a truly environmentally concerned group. One key informant claimed: “I have not seen the environmental ethics of RTs in Fernie...I wish I had” (Key Informant 2). Another said “they say they are environmentally minded, but I don't know if that plays out here” (Key Informant 11). Results from the survey and key informant interviews suggest that RTs place a high value on environmental amenities, but their behaviours may not correspond with this position. This could be a result of low engagement levels and involvement constraints discussed on page 56.

4.3.3.3 Environmental Impacts

Key informants identified both localized and societal environmental impacts of residential tourism in Fernie. Localized impacts related to the siting and pace of housing development, which some informants perceived as driven by RTs. One key informant pointed out developments which effected wildlife habitat and corridors in the area:

“We've built up on the wildlife corridor there and there (pointing out the window). We are blocking off riparian corridors there. We shouldn't be building if it causes a loss somewhere else.” (Key Informant 19)

Another was concerned with the increasing footprint of the community:

“It is challenging to think of an environmental benefit. I can think of costs...the sprawling footprint of the community...associated with this type of [residential tourism] development.” (Key Informant 2)

From the perspective of some key informants, the development of new housing for RTs has expanded the footprint of the community. This was seen to negatively impact wildlife habitat in the area.

From a larger societal level, some key informants felt that individuals who owned more than one property unnecessarily increased global consumption and pollution. One informant articulated a large list of environmental issues tied people to secondary property ownership in general:

“More developed space, more garbage, more demand on services that might be stressed. More energy use, more resource demand...”
(Key Informant 5)

Thinking more broadly again, one key informant articulated the positive environmental benefits of RTs to Fernie:

“My biggest [environmental] fear for mankind is urbanization...people are getting more and more detached from wildlife. The biggest benefit and best chance for us to do something good for [preservation of] the wild, is for people to experience it. Its better that people are living in a place like Fernie...enjoying the wilderness [rather than]...staying in Calgary, getting ever more detached from the wilderness.” (Key Informant 10)

Overall, the effects of residential tourism on Fernie’s environment were not regarded by key informants as being especially significant. While RTs were perceived to have high environmental ethics, their behaviours in Fernie did not seem especially biased in that direction. Most of the perceived environmental effects associated with residential tourism were associated with the siting and design of new housing developments which target RTs. These impacts are indirectly attributed to RTs.

4.4 Planning for Residential Tourism and Quality of Life in Fernie

This section addresses the research question: “What are the policy and planning implications of residential tourism’s affect on the QoL in Fernie?” The section first explores management responses for maintaining a high quality of life (QoL) for Fernie’s

residential tourists. This is followed by a discussion of how RT-related planning in Fernie can improve the QoL of Fernie's permanent population. The discussion is based on themes which surfaced in the key informant interviews and include planning strategies tied to:

- Fernie's population,
- RT home occupancy,
- RT engagement and involvement; and
- The future of RT housing development.

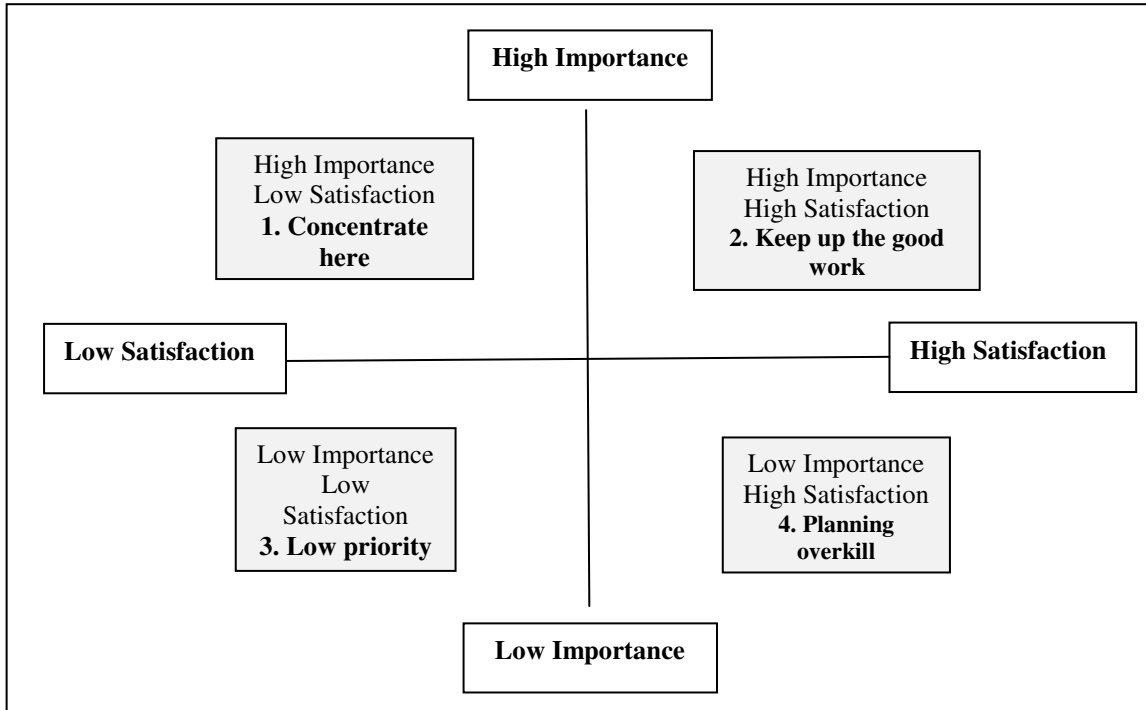
4.4.1 Importance-Satisfaction Analysis of Fernie Amenities

This section presents RTs' perspectives on the importance and satisfaction of a range of Fernie's features and services from a quality of life perspective. It also offers Fernie key informant reactions to the RT responses. An importance-satisfaction analytical (ISA) is used to identify the gap between what RT respondents indicated were important QoL amenities and their satisfaction with these amenities (Joppe, Martin & Waalen, et al. 2001). This analysis helps identify priorities for effectively responding to the QoL needs and expectations of RTs.

RT importance and satisfaction scores were plotted on a two dimensional grid with satisfaction measures on the x-axis and importance on the y-axis. The X and Y axis in Figure 15 portray the mean scores of importance and satisfaction¹⁰. Resultant attribute scores situate the importance –satisfaction of the factor in one of four possible planning quadrants. The right side represents scores which had above average satisfaction. The top right quadrant (high importance, high satisfaction) represents amenities that are well-managed; keep up the good work. The bottom right shows amenities with high levels of satisfaction despite being of limited relative importance to the respondents. The left side of the grid is associated with attributes with low mean satisfaction scores. The lower left quadrant (low importance, low satisfaction) includes amenities which are a 'low priority' for planning. The upper left quadrant, the most important from a planning perspective, is comprised of amenities with above average importance and below average satisfaction scores. Such attributes should be the focus of planning efforts.

¹⁰ The X and Y axes in an ISA grid can also be placed on: the middle of the scale (e.g. 2.5 on a 5 point scale), or at a target score (e.g. a satisfaction target of 4.0).

Figure 15- Importance- Satisfaction Analysis (ISA) Planning Grid



Adapted from: O’Leary and Deegan (2005)

In the survey, the rated importance and satisfaction of Fernie amenities for the QoL of RTs were separated into two questions. One specific to features and one specific to the services offered in Fernie. For ease of readability, the ISA analysis below separates feature and service-related amenities. Appendix D summarizes the mean and standard deviation scores for all variables in the ISA.

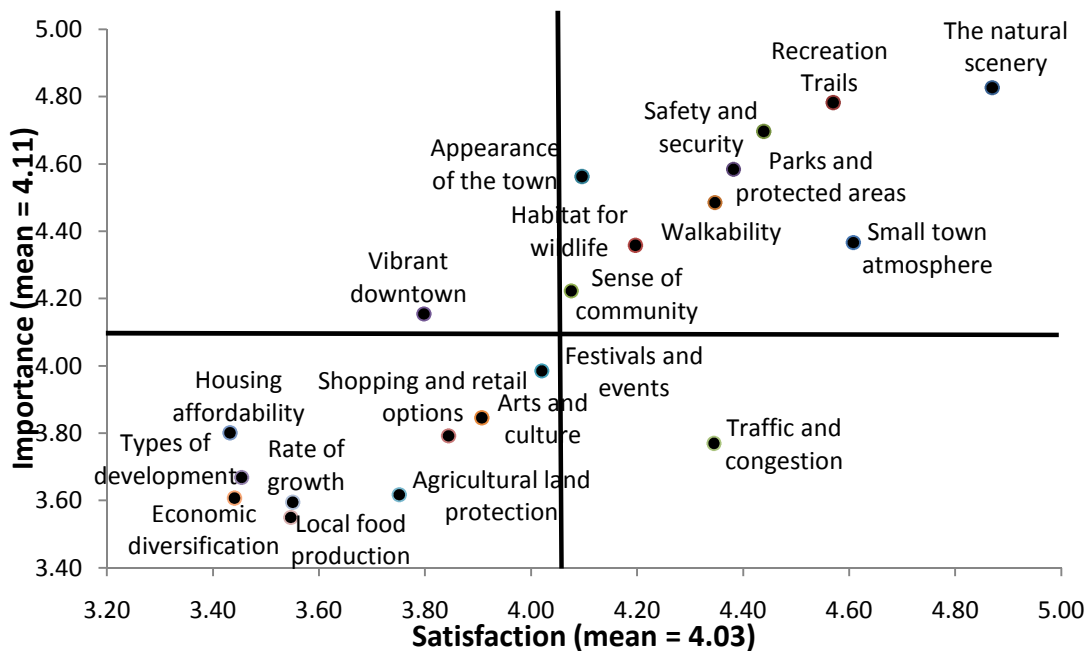
4.4.1.1 Importance Satisfaction Analysis of Fernie Features

The rated importance and satisfaction amongst RTs with 20 features in Fernie are shown in Figure 16. The horizontal line represents the grand mean importance score (4.15), and the vertical line shows the grand mean satisfaction score (4.03).

The results of the ISA analysis (Figure 16) were presented to key informants for comment. Most informants described a tourist-like perception of the RT responses. That is, those features clustered in the top right corner (highest importance, highest satisfaction) were seen as attributes more associated with tourists, rather than residents. However, the majority of key informants agreed that these attributes, notably the natural

scenery and recreation trails, were also important to their QoL. ‘Traffic and congestion’ was the only attribute in the bottom right (lower importance, higher satisfaction) quadrant. This signified that planning efforts tied to this attribute were sufficient. The bottom left quadrant (lower importance, lower satisfaction) showed ‘low priority’ attributes for improving RT QoL. Interestingly, key informants identified many of these lower priority attributes as important for the QoL of permanent residents. Notably, key informants felt economic diversification, rate of growth, types of development, and housing affordability should be much higher on the importance axis. One informant explained that “As a resident, you would be concerned with housing, food security, and economic conditions; they would be top of the list” (Key Informant 5).

Figure 16- Importance-Satisfaction Analysis of Fernie Features

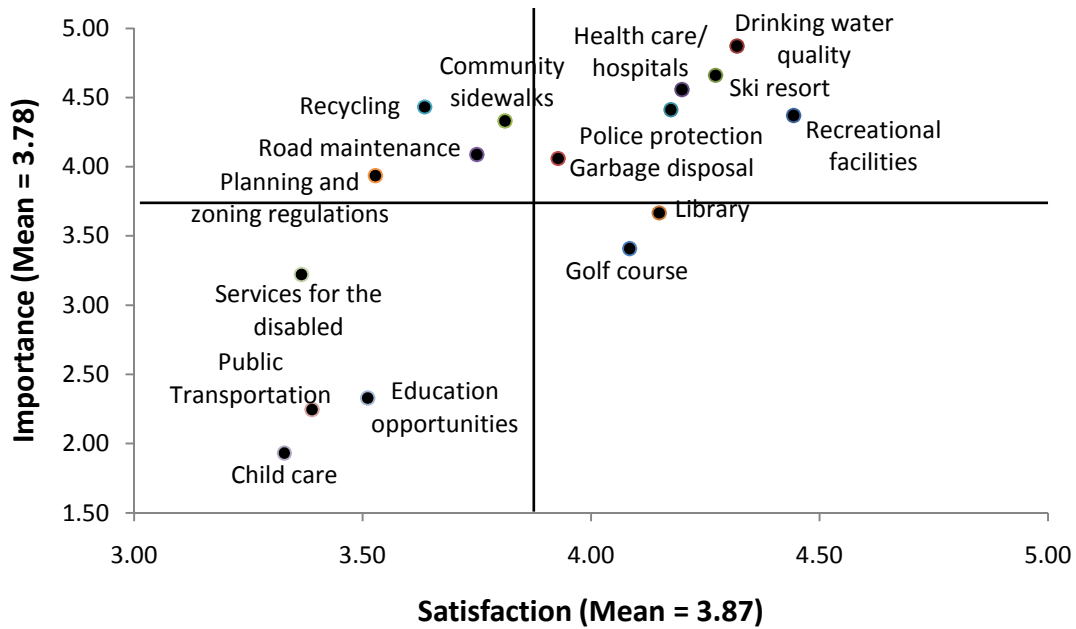


Only one feature, ‘vibrant downtown’ fell within the ‘concentrate here’ planning area (above mean importance, below mean satisfaction). Most informants agreed with the higher importance and relatively lower satisfaction with this QoL feature in Fernie. This suggests that focusing planning efforts on improving Fernie’s vibrant downtown could increase the QoL of Fernie’s permanent and part-time populations.

4.4.1.2 Importance Satisfaction Analysis of Fernie Services

RTs were also asked to rate their level of importance and satisfaction with 16 services in Fernie. The services are plotted using the mean importance (3.78) and satisfaction (3.87) scores (Figure 17).

Figure 17- Importance-Satisfaction Analysis of Fernie Services



RT responses suggest that the majority of services in Fernie were well managed and fit into the ‘keep up the good work’ (top right) quadrant of the ISA grid. Four services were of higher importance and lower satisfaction to RTs’ quality of life:

- Recycling services,
- Planning and zoning regulations,
- Roads maintenance, and
- Community sidewalks

The high importance and low satisfaction of these four variables suggests that planning efforts to improve the quality of life of RTs should focus on these areas.

Similar to the ISA features grid (Figure 16), trends emerge which demonstrate the tourist-like perceptions of RTs. Of particular note is the low importance of social

services, such as: transportation, child care, and education opportunities to the quality of life of RTs. One key informant explains:

“This shows the difference between them and permanent residents. Those [Child care, transportation, and education]...would be way higher on the importance scale [for permanent residents].” (Key Informant 11)

4.4.1.3 ‘Satisfaction Gaps’ from the ISA

Another way to analyze ISA data, beyond the ISA grid above, involved looking at differences between mean importance and satisfaction scores for each amenity. That is, to identify those amenities which were rated higher in importance than in satisfaction (i.e. satisfaction gaps). Table 12 shows amenities rated higher in importance than in satisfaction. Overall, 21 amenities¹¹ had this characteristic and are defined as ‘satisfaction gaps’ for providing a high QoL to RTs.

Recycling services demonstrated the highest satisfaction gap (-0.80) for RTs. Drinking water quality (-0.55), community sidewalks (-0.52), appearance of the town (-0.47), and planning and zoning regulations (-0.41) were also in the top five highest satisfaction gaps. Satisfaction gap analysis may be a more powerful tool than ISA, as amenities are independent of one another. That is, mean satisfaction and importance scores for each amenity are compared for each variable rather than to the mean scores for all amenities, as was done for the ISA. The power of this analysis is apparent with respect to drinking water quality. Under the ISA analysis, this variable was in the ‘keep up the good work’ quadrant. However, the satisfaction gap analysis showed that although it is above the total mean for all variables in both importance and satisfaction, there is a large gap between the mean satisfaction and importance scores for ‘drinking water quality’. This test is another indication of how quality of life can be improved for RTs in Fernie.

¹¹ The remaining 15 amenities from the survey were rated higher in satisfaction than importance and not included in the table.

Table 12- Satisfaction –Importance Differences for Fernie Amenities

Rank	Amenity	Importance Mean	Satisfaction Mean	Difference: ‘Satisfaction Gap’ ¹²
1	Recycling services	4.43	3.64	-0.80
2	Drinking water quality	4.87	4.32	-0.55
3	Community sidewalks	4.33	3.81	-0.52
4	Appearance of the town	4.56	4.10	-0.47
5	Planning and zoning regulations	3.94	3.53	-0.41
6	Ski resort	4.66	4.27	-0.39
7	Housing affordability	3.80	3.43	-0.37
8	Health care/ hospitals	4.56	4.20	-0.36
9	Vibrant downtown	4.15	3.80	-0.36
10	Road maintenance	4.09	3.75	-0.34
11	Safety and security	4.70	4.44	-0.26
12	Police protection	4.41	4.17	-0.24
13	Types of development	3.67	3.45	-0.21
14	Recreation Trails	4.78	4.57	-0.21
15	Parks and protected areas	4.58	4.38	-0.20
16	Economic diversification	3.61	3.44	-0.17
17	Habitat for wildlife	4.36	4.20	-0.16
18	Sense of community	4.22	4.08	-0.15
19	Walkability	4.49	4.35	-0.14
20	Garbage disposal	4.06	3.93	-0.13
21	Rate of growth	3.60	3.55	-0.04

4.4.1.4 Summary: Maintaining and Improving the QoL of Fernie RTs

Numerous different analyses were conducted to get a broad picture of how QoL could be maintained and improved for Fernie’s RT population. Table 13 summarizes these results.

The first two columns in Table 13 demonstrate the high importance placed on environmental amenities in Fernie; notably the drinking water quality, natural scenery, and trails. These environmental amenities are very important for RTs, but they are also quite satisfied with these aspects of Fernie. It is then important to maintain these

¹² Obtained by subtracting satisfaction mean from importance mean

amenities in their current state, and not degrade them, in order to maintain the current QoL enjoyed by RTs.

Table 13- Summary of Planning Implications for the QoL of RTs in Fernie

1	2	3	4
Most important QoL Amenities (mean scores)	Themes from QoL meaning (% of responses)	ISA analysis concentration areas	Satisfaction gap analysis (% gap)
1. Drinking water quality (4.87) 2. The natural scenery (4.83) 3. Recreation Trails (4.78) 4. Safety and security (4.70) 5. Ski resort (4.66)	1. Natural Environment (45%) 2. Recreation Trails (41%) 3. Friendliness (37%) 4. Small town (27%) 5. Safety and security (23%)	<ul style="list-style-type: none"> • Vibrant Downtown • Recycling services, • Planning and zoning regulations, • Roads Maintenance, • Community sidewalks 	1. Recycling services (-.80) 2. Drinking water quality (-.55) 3. Community sidewalks (-.52) 4. Appearance of the town (-.47) 5. Planning and zoning regulations (-.41)

Columns three and four in Table 13 provide different analyses of how the QoL can be improved for Fernie’s RTs. The results suggest:

- Fernie’s Recycling services are not targeted to the needs of RTs;
- Community sidewalks around Fernie are not to the standard that RTs desire; and
- Planning and zoning regulations are inconsistent with RT expectations.

In sum, to maintain QoL for RTs in Fernie, planning should focus on those amenities which are most important. To improve QoL, planning efforts should address the amenities with the highest satisfaction gaps, and those identified as ‘concentration areas’ in the ISA.

4.4.2 Fernie’s Population

An hypothesis put forth in the literature is that RT demand for vacation homes drives up real estate prices, which leads to an exodus of permanent residents who either cannot afford to get into the housing market or decide to cash in on the gains they have made and relocate elsewhere (see Gallent & Tewdwr-Jones, 2000; Gallent, Mace, &

Twedyr-Jones, 2005; Marjavaara, 2007). Subsequently, as one informant emphasized “If population declines, quality of life declines” (Key Informant 13). Declining permanent populations can result in reductions in service levels tied to declining school enrolment and provincial funding for social services. Thus, an important part of this research involves understanding the relationship between Fernie’s permanent population and residential tourism.

Fernie’s permanent population has been declining steadily since 1981. During this period the part-time (RT) population has increased significantly. Currently about 912¹³ (33%) of the 2,804 residential properties in Fernie are owned by RTs. On average about 3.9 occupants, including owners, friends, and family use the property per visit. This represents a part-time population of approximately 3,557¹⁴, nearly equivalent to Fernie’s permanent population of 4,217 (2006).

Key informants had diverse opinions with respect to the relationship between residential tourism and Fernie’s population decline. Some felt that the demand for vacation homes and subsequent escalation of housing prices played a role in Fernie’s population decline:

“There is absolutely a relationship between demand for homes by residential tourists and population. We are seeing residential tourism, but are not seeing [permanent] amenity migration. At least not equal to the exodus of people.” (Key Informant 22)

However, not all key informants shared the view that housing prices influenced overall population patterns. One informant reasoned that “I don’t think housing prices drove people out of town...I think most people who want to live here, [are able to] live here (Key Informant 18). Furthermore, key informants postulated various underlying factors that have influenced Fernie’s population decline over the last decade and a half. Notably, declines in the resource extraction sector, economic factors and changing demographics.

¹³ This number determined by subtracting total non-resident properties in Fernie (1046) by the proportion of survey respondents who did not meet the RT criteria (13%).

¹⁴ This does not include RTs who rent properties in Fernie. Statistics are not available for non-resident renters in Fernie.

With respect to the resource extraction sector, informants alluded to several factors, notably a decline in overall employee requirements at Fernie area mines. Other informants identified changing demographics, most significantly the baby boomers, as having an effect on Fernie's population. One informant correlates Fernie's population decline solely to demographic factors:

“The [population] problem is strictly demographics...55 percent of the population are over 45...Many residents have seen Cranbrook as an ideal location for a permanent home for the following [reasons]: regional hospital, minimal snow, shorter winters, more sunshine, public transportation, flat walking terrain, [and] shopping.” (Key Informant 14)

Other informants related the population decline partially to Fernie's shifting economy:

“When you transition out of resource extraction where everyone makes \$100,000 per year, to tourism where you make \$20,000 per year, you have permanent people move away.” (Key Informant 20)

Numerous compounding factors, including residential tourism, have contributed to Fernie's permanent population decline. However, key informants identified several ways in which RTs could be used as leverage for stabilizing Fernie's downward population trend.

4.4.2.1 Stabilizing Fernie's Population in the Context of Residential Tourism

Three significant themes emerged during with respect to stabilizing Fernie's population. Solutions were provided in the context of residential tourism in Fernie, and the opportunities associated with this phenomenon. However, the problem is complex and a full discussion of solutions is beyond the scope of this paper.

As the cost of housing was seen as a cause of population decline, the provision of attainable housing for Fernie's current and potential workforce was identified as a solution. This theme is discussed further on page 93.

Second, population is related to job accessibility, and as one informant remarked “If there are no jobs then people will move to where the jobs are” (Key Informant 5).

Thus, Fernie needs well paying jobs to maintain a healthy permanent population. However, as new technologies increasingly allow people to work from afar, job accessibility through telecommunication links is an increasingly important consideration. Many key informants identified the need for Fernie to invest in technologies to enhance local telecommunications links. Such investments form a large component of Fernie's future economic development goals (Mike Stolte & Associates, 2009), and would help attract mobile amenity migrants and new residential tourists.

The third strategy, tied specifically to residential tourism, involved the conversion of RTs to permanent residents. This was identified as "...the low hanging fruit for Fernie to increase population" (Key Informant 15). Key informant suggestions on how to achieve this are discussed below (page 86).

4.4.3 Increasing RT Home Occupancy

One of the most significant quality of life impacts of residential tourism in Fernie related to the low occupancy of homes and the negative effects on neighbourhood appeal and sense of community. Strategies to increase home occupancy of RT properties could mitigate some of the negative social impacts of residential tourism. Three different methods to increase occupancy of RT homes were identified:

1. Increase rental occupancy;
2. Increase the number of RT occupancy days per year; or
3. Entice RTs to move permanently to Fernie.

Each strategy will help mitigate the negative impacts and increase overall quality of life in Fernie.

4.4.3.1 Increasing Rental Occupancy

Increasing rental occupancy is a management option considered in many tourism destinations, particularly in Europe, as a way to avoid 'cold beds'. Two primary options exist for achieving this goal; encouraging secondary suites and/or increasing home rental occupancy rates. Few key informants felt positively about the idea of encouraging RTs to rent out their properties or to create secondary rental units. Most informants did not see this as a viable solution to the cold bed phenomenon in Fernie. One informant described how encouraging secondary suites in one Fernie neighbourhood was unsuccessful:

“Alpine Trails was developed as an R1B development. The belief was that people would develop secondary dwelling units and rent them to a permanent resident...but it hasn’t [worked]. Those people don’t need the extra \$500 per month of rental income and they would rather not have the encroachment on their privacy of having someone else on the property.” (Key informant 22)

4.4.3.2 Increasing Annual RT Visits

Understanding that an increase in annual use days of RT properties will enhance the overall QoL in Fernie, this section first profiles high use RTs, then discusses options for increasing annual visit days. The discussion assumes that any increase from the 65 day per year average will create social and economic benefits to the community.

Profiling High Use RTs

To better understand how to increase use days of RT properties, a profile of high use RTs was created by dividing the survey sample into three groups:

- Low use: 29 days per year or less (n= 54, 27%)
- Moderate use: 30-89 days per year (n= 95, 47%)
- High use: 90 days per year or more (n= 52, 26%)

The three groups were tested using bi-variate analysis, against a variety of variables from the survey (Table 14).

Table 14 shows that high use RTs (90 days or more per year) were more likely than low and moderate use RTs, to:

- have intentions of residing permanently in Fernie;
- live within a 300km radius of Fernie;
- be involved in a community group;
- have volunteered,
- attended a community event, and
- attended a sporting event in the last 12 months.

Length of property ownership and demographic variables tested, did not identify high use RTs.

Table 14- Summary Profile of High Property Use RTs.

Survey Factor	Low use (Less than 29 days/ year)		Moderate Use (30-89 days)		High Use (90 days or more/ year)		Chi- squared sig. ¹⁵
	n	%	n	%	n	%	
TOTAL	54	27%	95	47%	52	26%	
Intend to reside permanently in Fernie	10	19%	22	23%	23	44%	.005
Live within a 300km radius of Fernie	29	54%	78	82%	44	85%	.000
Owned Fernie property more than 5 years	33	61%	49	52%	27	55%	.531
Involved in a community group in Fernie	6	11%	14	15%	18	35%	.003
Volunteered in the last 12 months	2	4%	6	6%	11	21%	.003
Attended a community event in the last 12 months	24	44%	64	67%	40	77%	.001
Attended a sporting event in the last 12 months	9	17%	52	55%	36	69%	.000
Wealthy (annual income > \$200,000/year)	16	33%	45	52%	18	38%	.072
Highly educated (Bachelors degree or higher)	34	68%	71	76%	26	53%	.018

To further identify the permanent residence location of high use RTs, the sample was divided into four groups based on location of permanent residence:

- Calgary (122),
- The rest of Alberta (43),
- The rest of Canada (17),
- International (19)

¹⁵ Less than .05 is considered significant

Table 15- Relationship between property use and permanent residence

Permanent Residence	Total		Low use		Moderate Use		High Use		Chi-squared sig. ¹⁶
	#	%	N	%	N	%	N	%	
			54	27%	95	47%	52	26%	
Calgary	122	61%	18	33%	69	73%	35	67%	.000
Alberta	43	21%	18	33%	13	14%	12	23%	
Canada	17	9%	7	13%	7	7%	3	6%	
International	19	10%	11	20%	6	6%	2	4%	

RTs from Calgary are more likely to be high use RTs (Table 15). Calgarians represent 61 percent of the sample but are a greater portion of the moderate use (73%) and high use categories (67%), and a lower proportion (33%) of low use RTs.

Strategies to Increase Annual Visits

Key informants discussed various methods to increase the number of days that RTs spend in Fernie. They felt that strategies to increase home occupancy should focus on increasing mid-week and shoulder season occupancy. Some of the suggested strategies included:

“Financial incentives for increased occupancy...if you've been in Fernie for say 50 percent of the time, you get a tax break...” (Key Informant 1)

“Maybe more events. This is one thing that people will spend more time to come for.” (Key Informant 3)

“Put a higher tax on unoccupied dwellings...an environmental tax.” (Key Informant 5)

“...improv[e] biking trails and library. Social and recreational opportunities in town might make them come down more often...You need to keep them busy. They don't want to buy a property and then come here and have nothing to do. Taste of Fernie is great but we should have 6 more of those this year. Sundays [should be] closed off to traffic [along second avenue]...This sort of

¹⁶ Less than .05 is considered significant

thing will bring people down every weekend and contribute to the vitality of the community.” (Key Informant 13)

“Developing amenities in the town: hiking and biking trails, etc. these are positive in getting them to come as families in the summer. More outdoor recreation activities...Enhancing the summer offerings. Maybe festivals? Cultural festivals?” (Key Informant 23)

The majority of suggestions for increasing home occupancy of RT residences revolved around increasing the recreation and amenity offerings in Fernie. One informant stressed that new offerings should be coupled with some form of invitation or notification of events: “Put invitations in their utility bills. Let them know what is happening...a calendar of events (Key Informant 7). While most key informants were enthusiastic about enticing RTs to visit Fernie more often, some were not. One informant asserted that “I don’t want them (RTs) here anymore than they are...I want permanent families” (Key Informant 4).

4.4.3.3 Converting RTs to Permanent Fernie Residents

One of the most prominent themes throughout the key informant interviews was the imperative of converting RTs to full time residents in Fernie. This strategy could meet numerous objectives including: increasing population, economic development, and enhancing QoL. The challenge then becomes how to entice RTs to make the conversion from part-time to permanent resident. This section first profiles those RTs who are intending to reside permanently in Fernie, followed by key informant suggestions for enticing those who are not planning to make the move.

Summary Profile of RTs Intending to Permanently Move to Fernie

To further understand those RTs who were planning to reside permanently in Fernie, a bi-variate analysis was conducted. No significant relationship was found between intention to reside permanently in Fernie and:

- Proximity of permanent residence to Fernie,
- Property purchase date, or
- Number of properties owned

As demonstrated in Table 14, RTs who were planning to reside permanently in Fernie used their property more often than those who were not. There was also a significant relationship between most community involvement factors and intention to reside permanently in Fernie (Table 16). That is, a higher number of RTs who intended to become permanent residents in Fernie were more involved in the community when compared with those not intending to move permanently. In addition, the majority of RTs (59%) intending to reside permanently were identified as -‘environmentally-minded’¹⁷.

Table 16- Select characteristics of RTs intending to reside permanently in Fernie

Involvement Factor	Intending to reside permanently		Not intending to reside permanently		Chi-squared significance ¹⁸
	N	%	N	%	
TOTAL	55	27%	152	73%	
Involved in a community group in Fernie	16	29%	23	15%	.023
Volunteered in the last 12 months	12	22%	8	5%	.000
Attended a community event in the last 12 months	41	75%	89	58%	.035
Attended a sporting event in the last 12 months	36	65%	61	40%	.001
Attended a neighbourhood activity in the last 12 months	23	42%	46	30%	.277
Environmentally-minded RTs ¹⁹	31	59%	64	43%	.052

The results may suggest a link between community involvement and permanent RT migration. That is, RTs who are more engaged in community affairs in Fernie may be more inclined to move permanently to Fernie.

¹⁷ Environmentally-minded RTs were defined as those respondents who rated parks and protected areas, and habitat for wildlife as important to their quality of life (n=95).

¹⁸ Less than .05 is considered significant

¹⁹ Fewer respondents answered this question. 53 intending to reside permanently (26%), and 149 not intending to reside permanently (74%)

Strategies to Convert RTs to Permanent Residents

Key informants offered numerous suggestions for converting RTs to permanent residents. One informant recognized the existence of tourism-led amenity migration (TLAM) in Fernie, identifying a link between Fernie’s tourism industry and efforts to convert RTs to permanent residents:

“A visitor becomes a property owner, becomes a resident...there is an opportunity to convert a visitor to a property owner, and a property owner to a resident.” (Key Informant 6)

Following this, many informants felt the best strategy for converting RTs to permanent residents was to improve and expand the town’s recreational and amenity offerings. However, in contrast to the suggestions offered above (page 83), there was a greater focus on enhancing services for an older demographic:

“Enhancing hospital services and elder care/ home care would get more people to move here permanently.” (Key Informant 11)

“Every year they are less inclined to ski everyday...Many people move out of alpine skiing, want to keep active and they get into Nordic skiing and snowshoeing.” (Key Informant 6)

“More sidewalks...We don’t have a trail network system...We need more trails for an aging population, we need to build in the valley floors...” (Key Informant 14)

Another important set of suggestions revolved around enhancing Fernie’s ability to support knowledge and service-based industries. This was also offered as a suggestion for stabilizing Fernie’s declining population (page 81). One informant articulated the need for Fernie to invest in “...proper internet access and amenities that allow people to do their work from Fernie...encourage them (RTs) to bring their job to Fernie” (Key Informant 9). Investing in, and facilitating the development of, knowledge and service-based industries represent a significant opportunity for Fernie.

4.4.4 Engaging and Involving RTs in Fernie

Many key informants identified the solution to enticing RTs to use their property more often, and eventually move permanently to Fernie, involved engaging and involving them more in the community. This section explores factors which were perceived to have the potential to increase RT community involvement. Key informant perspectives on this topic are also portrayed.

4.4.4.1 Factors Influencing Community Involvement

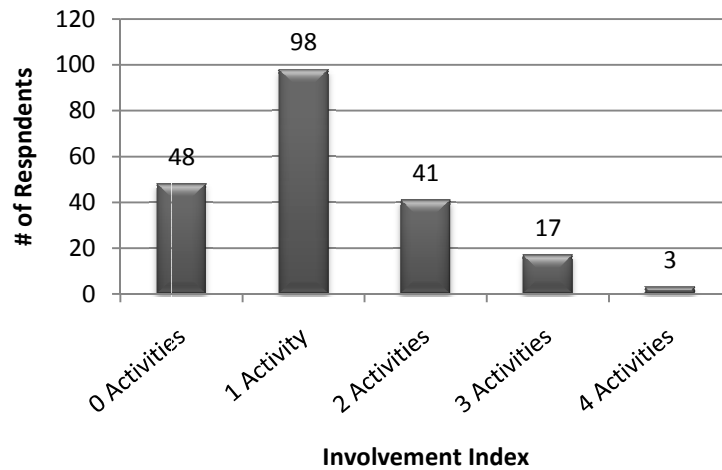
Results of the RT survey identified distinct characteristics exist for those RTs who were more involved in community affairs. The analyses identified that RTs intending to become permanent residents, and those identified as ‘high use’ RTs (Table 16 and Table 14 respectively), were more involved in Fernie’s community affairs. To better understand RT involvement, an index was created using involvement variables from the survey.

Respondents were assigned 1 point for claiming involvement with each of the following variables:

1. Involved with a community group
2. Attended a council meeting
3. Voted in Fernie’s municipal election
4. Volunteered in the community
5. Worked for a local business or other organization
6. Attended a Community event
7. Attended a sporting event
8. Attended a neighbourhood activity
9. Attended another community activity

The highest possible score was 9 (attended and/or involved with all variables). The largest proportion (47%) of RTs was involved with only one of the engagement indicators. The mean score is 1.17. A summative scale of RT involvement in Fernie was created:

Figure 18- RT Involvement Index



The community involvement index was tested against numerous variables to assess whether distinct characteristics exist for highly involved RTs. Past research suggests that involvement of RTs in a community can be influenced by several factors. RTs may be more involved in community affairs if they:

- Have voting rights,
- Intend to become permanent residents,
- Have resided in the community for more than five years,
- Live in close proximity to the destination, or

Beyond the variables identified in the literature (above), additional variables were analyzed in an exploratory attempt to create a profile of highly involved RTs. The variables included:

- Age,
- Income,
- Education level,
- Property use, and
- Rural RTs versus urban RTs²⁰

With respect to voting, only one respondent²¹ had voted in municipal elections in Fernie. This low response does not allow for analysis of whether voting rights influenced community involvement. Demographic variables were tested against the community involvement index and no significant relationship was found between demographic

²⁰ One key informant suggested that RTs who reside in rural areas may be more involved in the community

²¹ This represents 6.7% of the 15 eligible voters from the sample (BC residents)

characteristics in the survey (education, age, and income) and level of involvement. Some variables returned interesting results and are summarize in Table 17.

Table 17- Relationship between community involvement and potential facilitating factors

Involvement Index	Have owned property > 5 years		Reside within 300km of Fernie		Reside in Large urban centre		High use RT (90 days or more /year)	
	N	% ²²	N	%	N	%	N	%
Total	114	66%	154	74%	153	82%	52	26%
0 Activities	30	63%	27	56%	28	70%	4	9%
1 Activity	51	53%	73	75%	73	85%	21	21%
2 Activities	22	54%	34	83%	33	80%	17	42%
3 Activities	10	67%	17	100%	16	94%	8	53%
4 Activities	1	33%	3	100%	3	100%	2	67%
Chi-squared Significance	.611		.002		.150		.000	

Past research suggests that RTs who have owned their properties longer than 5 years may be more likely to become involved and make a long-term commitment to the community (Gill, 2000). To test this hypothesis, RTs were divided into those who purchased properties before 2005 (n=114) and those who bought after 2005 (n=90). Based on Pearson chi-square significance testing, there was no significant relationship between length of residence and community involvement amongst RTs in Fernie.

To test whether proximity of permanent residence to Fernie held any significant influence on level of community involvement, the sample was divided into RTs who resided within a 300km radius of Fernie (n=154)²³, and those who lived beyond 300km (n=53). The 300 km radius was chosen arbitrarily based on the high proportion of Calgary respondents from the survey (60%), and need to incorporate them into one group. Results showed that RTs who resided within the 300km radius had higher community involvement index scores; they were more likely to be involved in community activities in Fernie (Table 17).

²² Percentages shown are those within the dependant variable group

²³ Calgary is considered within 300km of Fernie

One key informant suggested that RTs who resided in smaller rural areas, as opposed to large urban centres may be more involved in community affairs. This hypothesis was tested by dividing the sample into those from large urban centres (n=153), and those from smaller rural areas (n=34)^{24,25}. The results of this test showed the opposite to be true. A higher proportion of RTs from large urban centres, as opposed to rural areas, were involved in community activities in Fernie (Table 17). To further explore this result, and test the strength of influence from Calgary-based RTs, the sample was divided into four groups based on location of permanent residence and tested against the community involvement index (Table 18).

Table 18- Community involvement index and location of permanent residence

Involvement Index	Calgary		Alberta (outside Calgary)		Canada (outside Alberta)		International		Total
	N	% ²⁶	N	%	N	%	N	%	
Total	125	60%	43	21%	19	9%	20	10%	207
0 Activities	16	33%	15	31%	9	19%	8	17%	48
1 Activity	63	64%	17	17%	6	6%	12	12%	98
2 Activities	27	66%	10	24%	4	10%	0	0%	41
3 Activities	16	94%	1	6%	0	0%	0	0%	17
4 Activities	3	100%	0	0%	0	0%	0	0%	3
Chi-squared Sig.	.001								

A greater proportion of RTs from Calgary were involved in community activities in Fernie, when compared with RTs from other areas. In sum, RTs tend to be more involved in community affairs if they:

- Have intentions of residing permanently in Fernie,
- Reside within a 300km radius of Fernie,
- Use their property more than 90 days per year, and

²⁴ This test was only conducted on Canadian responses.

²⁵ Respondents from Medicine Hat and Lethbridge were considered rural.

²⁶ Percentages shown are those within the dependant variable group

- Permanently reside in Calgary.

It is important to acknowledge that other variables, which were not tested in the survey, may influence RT community involvement. Such factors may include personality traits, or other more subjective variables which were beyond the scope of this study.

4.4.4.2 Increasing RT Community Involvement

Key informants felt strongly that RTs should be more engaged in the community and that increasing community involvement can both increase use days, and lead to permanent RT migrations. As a largely untapped potential in the community, key informants put forth a variety of ideas to increase RT community involvement:

- Mentor programs to connect RTs with permanent residents to share skills and ideas;
- A home buyers welcoming guide which outlines Fernie’s vision, and introduces new RTs to “...the real community...the arts scene...the local characters, [and] some of the local colour...(Key Informant 21);
- “We need to respect them and get rid of the negative comments. We need to make them feel welcome.” (Key Informant 16). This could be achieved through community education and/or the mentor program described above;
- A calendar of events and invitations to RTs to join in community events;
- Scheduling of community events and programs to better target the dates and times when RTs are in Fernie;
- “Host a weekend a year for non-residents...where the RTs and residents mix and mingle and get to know each other.” (Key Informant 21)

Implementing some of the ideas above may work to increase home occupancy and encourage RTs to move permanently to Fernie. Such strategies would also increase the QoL Fernie’s permanent population by working to increase population and mitigate negative social implications ‘cold beds’.

4.4.5 Future Residential Tourism & Housing Development in Fernie

The final theme of discussion with key informants revolved around future RT focused housing development in Fernie. As one informant declared “from 1996 to 2006 all housing stock [in Fernie] was created for residential tourists” (Key Informant 6). The

preceding sections identified that these developments may have negative effects on QoL for Fernie's permanent population. Negative impacts included: dark neighbourhoods, affordable housing, and the development footprint of the community. This section explores whether future residential tourism development can be modified so as to mitigate these negative impacts.

Overall, the majority of key informants felt that the proportion of RTs (33% of properties in Fernie) to permanent residents in Fernie is too high, but that the community should continue to pursue housing development aimed at this group. From the perspective of key informants however, the negative QoL impacts of future residential tourism developments could be mitigated by:

- Pursuing slower levels of growth,
- Maintaining the current footprint of the community,
- Strategically siting RT properties, away from the community core, and
- Providing a variety of attainable housing options for permanent residents.

The pace of residential tourism development in Fernie over the last decade has occurred at too rapid a pace for many key informants. Two informants identified differing reasons for this:

“We can't just keep developing homes...a time will come when we can't construct here anymore without seriously damaging the environment, the valley will be full...we need to start slowing it down.” (Key Informant 19)

“When I got here there were only a few construction companies, everyone was happy and it was sustainable. It's not sustainable now; we can't maintain that kind of growth.” (Key Informant 7)

The preceding two quotes identify both environmental and economic reasons for slowing down future residential tourism growth in Fernie. However, for some, social reasons included the need for a change in development patterns in Fernie, mainly housing. Many informants reiterated that affordable housing needed to be addressed in new developments:

“...you have to have some high end. But you also have to have housing for younger people...for my children; they are the future of this town.” (Key Informant 17)

“We [should] aggressively pursue affordable housing. So that you are not just converting retirees into residents, but creating space for all the people that need to service those folks... [we] need to use as many affordable housing tools as we can.” (Key Informant 2)

Fernie’s *Affordable and Attainable Housing Strategy* (City Spaces Consulting, 2007) identifies numerous opportunities for creating affordable and attainable housing in the community.

Although many informants identified the need for affordable housing, others stated that the affordable housing issue was driven by supply. That is, housing was too expensive because there was a lack of housing supply in Fernie. This view suggested that the solution to affordable housing may be to increase housing supply, and build more homes both for RTs and permanent residents. Many informants however were also concerned about the increasing development footprint of the community. One informant affirmed that there should be a “greater focus on densification, start going up and stop going out” (Key Informant 22). Thus, a strategy to address affordable housing with an increase in housing supply would need to recognize the potential negative QoL impact of expanding the community footprint.

In terms of responding to negative QoL impacts of residential tourism, some key informants felt that siting of new developments could mitigate the socio-cultural impacts of dark neighbourhoods. That is, if RT developments were purposefully located either at the periphery of the community, or in distinct nodes within the community, the negative impacts of dark neighbourhoods could be averted. One respondent clarifies this position:

“If your master plan for the community is such that RT properties are away from the community’s heart, then you don’t lose those things that bond the community together...” (Key Informant 10)

Another informant echoed this position, calling resort developments the “tourism equivalent of strip mines”. He supported the notion of having separation between residential and recreational property developments:

“We don’t want to strip mine 3rd, 4th, and 5th avenue...and put a bunch of recreational properties there...If you strip mine and have all the downtown properties designed for recreational property owners, you are creating a void in the middle of an important part of your community.”(Key Informant 6)

One informant did not support the separation of RT developments from more permanent dwellings, and outlined the need to work towards greater integration of RTs in the community:

“I don’t agree with segregation, I always agree with integration...Some people (RTs) come for the community here; they want to be integrated, so if you separate that and take that away, then Fernie is less appealing for them.” (Key informant 15)

The purposeful location of RT developments away from the community core would work to mitigate negative social impacts of dark neighbourhoods, and was largely supported by community stakeholders. However, such strategies would need to be cognizant that some RTs want to be in the community core, and such a strategy may reduce the appeal of owning a property in Fernie for some RTs.

A theme that emerged often was the City’s plans to develop a 1500 unit golf resort development, Blackstone Resort, on the outskirts of the community (City of Fernie, 2003). Some key informants supported this plan, and identified it as an important opportunity to attract RTs, and entice RTs to move permanently. One informant asserted:

“It (the Resort Development) is a required amenity for us to go forward. The key thing to latch onto is the amenity. Snowboarding is on a decline, golf is on an incline...I don’t think 2 courses will do it, you need 3 in Fernie...” (Key Informant 12)

Other key informants were sceptical of the economic and environmental sustainability of the new golf development. One informant preferred to see the area turned into a ‘green space housing development’:

“...build a green space with trails, and a creek...turn it into natural gardens and green spaces. You make way more profit because you

don't have the expense of building the golf course.” (Key Informant 7).

Similarly, another key informant was not convinced of the long term economic viability of another golf-centred development in Fernie:

“Many people say you need 3 golf courses for Fernie to be a destination... Tourism's biggest threat is over capacity. It's all driven by the baby boom bubble...What happens when all that bursts?” (Key Informant 20)

Some informants offered bigger picture ideas of how future development should proceed. Two informants offered insightful ideas on how developing a healthy and liveable community could serve as a key strategy for sustainable development:

“If you develop a place where people want to live, everything else will fall into place as it should...If you have a community that is dynamite and people really want to live there, people will bring their creative ideas and jobs.” (Key Informant 7)

“The demographics are shifting... the development model is changing too. [People] want to live in a healthy community. You need a seamless link between everything and downtown. You need seamless, drive less pedestrian links to everything, including the ski hill...” (Key Informant 12)

Based on key informant discussions, Fernie should continue to pursue residential tourism development, but at a slower rate, and while maintaining the current footprint of the community, and providing affordable and attainable housing options for permanent residents. Fernie should have a long term plan for residential tourism development which addresses these issues. Moreover, Fernie planners must be cognisant of broad social, economic and demographic trends to ensure future residential tourism developments are consistent with the needs and wants of permanent residents and RTs.

CHAPTER 5- DISCUSSION

Residential tourists (RTs) have played a role in shaping Fernie's culture, environment, economy and social fabric. These forces have had both positive and negative effects on local quality of life (QoL). Many important planning lessons and theoretical implications can be taken from this case when managing the potentially transformative effects of residential tourism on QoL in rural tourism areas. This section integrates and compares the research findings (chapter 4) with the academic literature review (chapter 2) to discuss the planning implications of residential tourism in Fernie. The discussion first returns to Gill and Williams' (2006) 'Tourism-led Migration and the Transformation of Place' framework to ground the research findings in this theoretical context. Following this, planning strategies which capture and reinforce quality of life values in Fernie and address the key challenges and opportunities of residential tourism are explored.

5.1 Revisiting the "Tourism-led Amenity Migration and the Transformation of Place" Framework

Gill and Williams' (2006) 'Tourism-led Migration and the Transformation of Place' framework (Figure 1) suggested that tourism-led amenity migration (TLAM), and the subsequent transformation of tourism areas was driven by the flow of people, capital and knowledge into these places. Such flows can change the local economy, landscape, social fabric and political structure of a community. Gill and Williams (2006) asserted that the viable future of many rural tourism areas depends on how effectively these places can use voluntary and regulatory planning initiatives to mitigate vulnerabilities and exploit opportunities.

According to Gill and Williams' (2006), temporary and permanent migration patterns are increasingly driven by tourism and amenity-related agents in host destinations. Stewart (2000) and Rodriguez (2001) elaborated that tourism can serve as a 'recruiting post' for potential RTs and permanent amenity migrants. The results of this research confirm these assertions. Several RTs in Fernie were specifically drawn by tourism-related amenities (including downhill skiing, biking, camping, golfing, and hiking) prior to purchasing their property in Fernie. However, contrary to the Gill and

Williams (2006) framework, and important for future theoretical discussions in the field, is that a proportion of RTs had not visited Fernie prior to purchasing a home. Furthermore, several were not initially attracted to Fernie by its tourism-related amenities. Instead they came to visit friends and relatives, because Fernie was recommended by someone else, or they were ‘passing through Fernie on their way elsewhere’. These results suggest that while tourism-related amenities play a significant role, other factors exist which affect migration and mobility patterns in rural areas.

Further to the tourism-related motivations of RTs, 14 percent had purchased their property as an investment, rather than for retirement or vacation home purposes. This proportion is lower than results found in Northwest Colorado (27%) (NWCCOG, 2006), and Canmore (~39%²⁷) (McNicol & Sasges 2008). The influence of non-amenity assets in property purchase decisions of RTs partially supports the findings of Francese (2003) and Kuentzel and Ramaswamy (2005) suggesting that economic and demographic factors influence RT property purchase decisions. However, based on the survey results, tourism and amenity agents remain the primary motivation for RT property purchase in Fernie.

Overall, over one quarter of RTs planned to reside in permanently in Fernie, either to work or retire (Figure 14), confirming the relationship between tourism, amenities and migration in rural areas. This result supports findings from similar resort-based communities, such as Canmore (McNicol and Sasges, 2008) and Northwest Colorado (Venturoni, 2003), where 28 percent and 14 percent respectively of RTs planned to migrate permanently. These findings run counter to Stedman’s (2006) findings from rural Wisconsin that second home owners do not eventually live year round in their second homes. The difference in these studies could stem from two factors. First, Stedman (2006) focused specifically on rural areas, while Venturoni (2003), McNicol and Sasges (2008), and this study incorporated municipal areas with a strong resort community orientation. The latter studies reported higher conversion rates for RTs becoming permanent. This suggests that RTs with property in rural communities may be more likely to migrate than those who own properties in high amenity rural areas. Second, the highest conversion rates for RTs were reported in this study and in Canmore (McNicol

²⁷ The results may not be comparable with McNicol and Sasges (2008) as their question allowed respondents to ‘select all that apply’, rather than select the most fitting.

and Sasges, 2008). Both Fernie and Canmore draw the majority of their RT populations from Calgary, highlighting Calgary's substantial wealth and influence.

5.1.1 Key Residential Tourism Planning Challenges in Fernie

From a more applied perspective, Gill and Williams (2006) suggested that new forms of mobility create challenges and opportunities for tourism development. The implications of these should be used to inform community planning decisions. The four most significant challenges of residential tourism on the quality of life (QoL) in Fernie were:

1. The upward pressure on housing prices which affects the affordability and attainability of housing in Fernie;
2. The managing a more transient population versus what was previously a stable, permanent population;
3. Negative environmental impacts tied to the siting and pace of new RT developments; and
4. The loss of community and neighbourhood appeal resulting from unoccupied RT homes.

Housing affordability was a recurring theme in the literature, and is often identified as the most significant impact of residential tourism on host communities (Hettinger, 2005; Gallent, Mace, & Tweddyr-Jones, 2005, Moore, Williams, & Gill, 2006; McWatters, 2009). Hettinger (2005) suggested that housing affordability was an inevitable result of second home demand in rural tourism areas. The results of this research found that RTs in Fernie have some influence on the housing market, but prices are also influenced by external and regional economic trends as well. Although housing affordability may be a challenge in Fernie, it is not entirely the result of RT demand for recreational homes. That being said, residential tourism is still likely a major influencing factor on housing, based on input from the majority of key informants, and steps should be taken to mitigate the influence RTs on increasing housing prices.

Past research suggested that second home demand, through the inflationary pressure put on real estate prices, exerts a displacement affect on local populations (Gallent & Tewdwr-Jones 2000; Gallent, Mace, & Tweddyr-Jones, 2005), which results in a depopulation of the area. Such a de-population can negativley impact QoL by reducing

provincial funding for social services such as schools and hospitals. Shucksmith (1983) and Gallent, Mace, & Twedyr-Jones (2005) clarified that such displacement does not occur where vacant homes exist. In this case, RTs would simply fill vacant homes rather than displacing existing residents. This however is not the case where homes are fully occupied. A community with fully-occupied homes, coupled with RT home demand, will experience a downward pressure on permanent population. As RTs have influence on the cost of housing, it can also be said they influence the population trend in Fernie. That is, they increase the cost of housing which leads to:

- Existing home owners selling their property to “cash out” and buy outside of Fernie,
- The inability of young families to purchase homes, and
- Difficulties with employee retention for local employers.

These effects were confirmed by the anecdotal experiences of several key informants. It must be recognized however, that other variables beyond housing prices influence population decline; notably demographic trends (rural exodus to urban centres), declines in resource extraction, and Fernie’s new tourism economy (with a trend towards lower paying jobs). This transition from a stable permanent population to a more transient one creates challenges for local business in Fernie. In sum, displacement of permanent residents in Fernie by RTs was a challenge but not the only impact of residential tourism.

With respect to environmental impacts, NWCCOG (2004), Chipeniuk (2004), and Clifford (2002) suggested that residential tourism developments can increase the development footprint of rural towns, and result in a loss of wildlife habitat and forested areas. The research findings do not refute this hypothesis, however they do provide the caveat that while this may have occurred in Fernie, it is not directly attributable to RTs. Such impacts are the result of planning and development patterns which are controlled and regulated by City staff and elected officials.

Past studies from high amenity tourism areas often suggest that housing (Hettinger, 2005; Gallent & Tewdwr-Jones, 2000; Gallent, Mace, & Twedyr-Jones, 2005; Moore, Williams, & Gill, 2006), and environmental concerns (Moss, 2006a) are the most significant negative impacts of residential tourism on local populations. Based on key informant perspectives, these challenges are overshadowed by the ‘cold bed’

phenomenon, and negative impact it has on neighbourhoods and sense of community. This study shows this phenomenon has diminished overall quality of life for many Fernie residents. These results support the findings of Glorioso & Moss (2007), Thompson (2006), and Bush (2006) who suggest that ‘cold beds’ can negatively affect neighbourhood appeal, sense of place and quality of life in host destinations.

The challenges above support many of the ‘transformations of place’ outlined by Gill and Williams’ (2006) in the TLAM framework. However, two QoL transformations identified in the framework did not emerge in the case of Fernie - issues over access, and power and political structures. However, there is a sense and perceived need to leverage the human and social capital of RTs for the benefit of community’s overall QoL.

5.2 Leveraging the Human and Social Capital of Residential Tourists

This research showed that Fernie’s RTs are a source of human and social capital for the city which has not been fully realized. Demographically, Fernie’s RTs match with the demographic characteristics of RTs from other areas; they are older, wealthier, and more educated than host destination residents (NWCCOG, 2006; Venturoni, 2003). Furthermore, they are attracted by, and their quality of life is dependant on, Fernie’s high quality natural environment and cultural attractions. Significant potential exists to further utilize their experience, knowledge, and financial capacity to benefit overall quality of life in the community. Two methods for achieving this were identified in this research. They were enticing RTs to visit more often, and getting them more involved in the community when in Fernie.

Although past research has suggested ways in which communities can increase RT rental occupancy (e.g. Bieger, Beritelli, & Weinert; 2007), no studies specifically identified methods for getting RTs to visit their recreational homes more often. Many of Fernie’s RTs are already high use visitors. They claim higher occupancy (65 days per year) than those in other high amenity areas, such as Michigan (53 days per year) (Gartner, 1987), and Northwest Colorado (64 days per year) (NWCCOG, 2006). Despite this high use, cold beds and dark neighbourhoods in the community are still felt by permanent residents to be impediments to Fernie’s QoL. There is a perceived priority on

the part of the key informants in this study to work towards increasing RT property use. Ideas for achieving this were discussed on page 83 and focused primarily on expanding and enhancing the range of recreational amenities and cultural activities offered in Fernie. Examples from other communities attempting to increase RT home occupancy were limited.

Although past studies have discussed RT community involvement levels, no studies have addressed planning approaches for increasing RT involvement in host communities. Key informants in this research process identified several strategies for engaging and involving RTs in the community. These included:

- Scheduling community events and programs to better target the dates and times when RTs are in Fernie (namely summer and winter seasons, weekends, and holidays);
- Informing RTs, through a newsletter, notification, or calendar of events, of the scheduled events and activities occurring in the town;
- Creating a mentorship program which connects RTs with permanent residents to share skills and ideas; and
- Developing a home buyers welcoming guide which outlines Fernie's vision, and introduces new home owners (whether RTs or permanent residents) to the arts, culture, sporting scene, and potential community involvement opportunities.

Examples of the first three strategies (re-scheduling events, targeting RTs with community event schedules, and creating mentorship programs) were not found in other literature or community planning initiatives. Several communities however have 'home buyers' guides designed to help new home owners better understand the values of the local area. These include:

- Canmore's 'Home Buyers' Guide to Environmental Stewardship' which outlines Canmore's social and environmental values and provides new home owners with ideas for living with wildlife, protecting natural assets, and responsible environmental behaviour (Chinook Institute for Community Stewardship, n.d.);
- 'A Place in the Islands'. A newcomers guide to the San Juan and Gulf Islands that tells new property owners how to use, care, and enjoy their new property. The colourful booklet includes several photos which demonstrate how siting and design of homes can preserve the aesthetic beauty of the area (Islands Trust and the San Juan Preservation Trust, 2007); and
- The 'North Slokan Valley Welcoming Guide' which provides a sketch of the local culture, environment and way of life in the North Slokan. It is designed for

visitors and those who plan to make the North Slovan their home (Healthy Housing Society, n.d.).

It was discovered through this study's research process that significant links exist between tourism, residential tourism and amenity migration. As such, it seems reasonable to assume that there is also a link between strategies designed to increase property use and engagement, and strategies to convert RTs to permanent residents.

5.3 Residential Tourists as a Source of Future Permanent Residents

Fernie's residential tourist population can serve as a significant pool of potential new permanent residents for the community. This potential permanent population source is one of the most significant opportunities for RTs to improve the overall quality of life (QoL) in Fernie. This opportunity was identified as the 'low hanging fruit' for Fernie to stabilize its downward population trend. Through converting RTs to permanent residents, QoL can be improved by helping to offset the potential negative effects created by unoccupied homes and increasing economic, human and social capital contributions of RTs in the community. The three most opportunistic methods for converting RTs to permanent residents included:

1. Enhancing social infrastructure aimed at an older baby boom demographic (e.g. health services, elderly care, accessibility, walkability, etc.);
2. Investing in transportation and communication technologies (e.g. broadband internet, a technology park, etc.); and
3. Increasing the recreation, amenity and cultural offerings in Fernie.

Enhancing Fernie's social infrastructure may entice more RTs to move permanently to Fernie. This conclusion is in line with Moss' (2006b) notion that 'comfort amenities' create a pull factor for potential amenity migrants. According to Moss (2006b) comfort amenities were high-standard public facilities and services such as: paved roads, water, electricity, waste management systems, hospitals, libraries, and sports and social clubs. For Fernie's RT population, the most prominent social amenities in terms of importance for their quality of life were: health care and hospitals, the vibrant downtown, road maintenance, police protection, recreation facilities, sidewalks, and water quality

(see Table 11). Enhancing these social amenities could lead to increased rates of conversion from RT to permanent resident.

Moss (2006b) also identified that a global increase in amenity-related mobility was driven partially by access to communication and transportation technologies. Sheller and Urry (2006) expanded that new technologies reduce the need for a physical presence in the workplace. This creates the opportunity for skilled professional workers to live and work in different locales, often high amenity rural tourism communities. Discussions with key informants in Fernie confirmed these assertions. That is, informants felt that an increasingly important way to increase RT property use and entice RTs to move permanently to Fernie was in making investments in information, communication, and transportation technologies to facilitate development of a knowledge-based 'mobile' economy. Examples of such investments might include: faster more reliable internet access, a designated light industrial technology park, a business incubation centre, video-conferencing facilities, and better public transportation services to Calgary and Cranbrook. Effective implementation could include public-private partnerships with existing Fernie businesses. Beyond enticing RTs to move permanently, these investments, if effectively promoted, could attract new skilled workers, entrepreneurs, and mobile firms.

In 2009, the City of Fernie commenced creating an economic development strategy by hosting an 'Economic Development & Opportunity Identification Forum' (Mike Stolte & Associates, 2009). The results of this forum suggested that the development of light industry, specifically information technologies and telecommunications were an important economic opportunity for Fernie. The study's findings provide additional rationale for such developments.

The third method for converting RTs to permanent residents, and the most significant opportunity to leverage residential tourism component for the benefit of the overall quality of life in Fernie entails enhancing Fernie's recreation, amenity and cultural offerings. This opportunity is discussed below on page 106.

5.4 Preserving Key Quality of Life Attributes

The natural amenities and cultural offerings in Fernie are highly important to the quality of life of both part-time and permanent residents. One of the prominent conclusions emanating from this research is the long term imperative of promoting, enhancing, and preserving unique characteristics which draw tourists, investors, and migrants. In the case of Fernie, these attributes are linked to the creation and retention of environmental amenities, including recreational trails, natural scenery, water quality, and protected areas. Socio-cultural amenities including the small town atmosphere, vibrant downtown, health care facilities and cultural events are also important.

The findings of this study go beyond Sheller and Urry's (2006) idea that new mobilities reduce the need for a physical presence in the workplace. They point to a need to create opportunities for skilled professional workers to live and work in different locales. The results suggest that economic and social development in an area can be motivated by the presence of QoL amenities. These findings are consistent with Nelson's (1999) discovery that investments in QoL amenities such as schools, parks, and environmental protection are at the core of sustainable development in high amenity tourism communities. The research also supports Snepenger, Johnson, and Rasker's (1995) findings that high quality amenities drive entrepreneurial migration decisions. No longer having to rely on 'in situ' industries, high amenity rural communities can focus their efforts on 'amenity preservation' to attract professional workers (telecommuters), entrepreneurs, and mobile firms.

Amenity preservation involves ensuring that future residential, commercial, and industrial development works to enhance and not degrade key QoL amenities. Various frameworks exist for implementing amenity preservation development. For example, Fernie's Official Community Plan (OCP) (2003) uses Smart Growth principles to ensure development is consistent with local and regional environmental considerations. The City has incorporated nine SG policies into the OCP. It is important to note however that Fernie is surrounded by crown land and unincorporated areas which are administered by the Provincial and Regional District governments respectively. The extent to which SG policies are reflected in provincial and regional development decisions is unknown.

In sum, these findings identified the important QoL amenities in Fernie, and the unique opportunities to leverage these amenities, along with the social and human capital of RTs to support amenity preservation. The City of Fernie has already taken a proactive approach to amenity preservation by the creation of its QoL index. Successful implementation will depend partly on how effectively amenity preservation policies can be integrated into Fernie's strategic plans.

5.5 Residential Tourism in Strategic Community Planning

Given its prominence and influence on community QoL, residential tourism should be considered in Fernie's strategic planning initiatives. A key component of integrating residential tourism into community planning is in understanding the socio-demographic and behavioural characteristics of RTs, as well as potential QoL benefits, challenges and planning implications. These questions have been answered through this study. Using the data from this study, this section proposes strategies for integrating the key findings of this research into Fernie's strategic planning framework.

5.5.1 The Official Community Plan

Official Community Plans (OCPs) are strategic planning documents which outline the form and character of future developments in a community. All bylaws and works undertaken in the community must be consistent with the OCP. OCPs often include development restrictions in the form of development permit areas (DPAs) and supporting policies. Fernie should use strategic policies in its OCP to enhance and protect its unique QoL assets and address current challenges associated with residential tourism.

Section 919.1 of the Local Government Act allows local governments to create DPAs which can be used for the purposes of protecting the natural environment, its ecosystems and biological diversity. Fernie's current OCP includes a 'watercourse protection DPA' (City of Fernie, 2003), but does not have a DPA which focuses specifically on preservation of its natural scenery and recreation trails, which are so important for community QoL. Such a DPA could also help protect drinking water quality, and mitigate environmental impacts of residential tourism developments.

DPA's can also address the revitalization of commercial areas. Fernie's 'Historic Downtown Core DPA' includes restrictions tied to the citing, form, and character of buildings in the downtown core. However this DPA could also be used to enhance the vibrancy of the downtown core, one of the key QoL improvement requirements for RTs (Table 13). This could include strategies to increase the number of people, events, and activities which occur in this area, and ensure that business development is consistent with the creation of a vibrant atmosphere. Such policies should also be considered within the Highway Corridor DPA which competes with Fernie's downtown core for business activity.

5.5.2 Zoning Bylaws

Sections 903 and 904 of the Local Government Act (LGA) describe how local governments, through the creation of a zoning bylaw, can regulate the use, siting, size, and location of buildings and other structures within the community. Zoning bylaws can also establish 'conditions' within particular zones which allow for the conservation of amenities and provision of affordable and special needs housing. These zoning 'conditions' could be applied in new and existing developments to mitigate impacts and enhance benefits of RT housing developments. Using these zoning conditions, the City of Fernie could mitigate environmental impacts of RT developments by strategically siting new developments in a way that maintains important QoL amenities, such as natural scenery and recreation trails. Similarly, zoning conditions could be applied to the siting of new residential developments targeting RTs. Such developments could be zoned away from the community core; thereby mitigating negative impacts such as loss of community and neighbourhood appeal, tied to the low occupancy of RT homes. Strategic siting of new commercial, residential, and industrial developments can also help Fernie retain its small town atmosphere and character. This could be achieved, for example, through densification zoning, or siting to reduce the visual impacts of new developments. Zoning conditions could also be used to promote affordable and attainable housing; one of the potential QoL impacts identified by community stakeholders.

5.5.3 Development Cost Charges

Development cost charges (DCCs) are fees imposed by local governments on new developments which assist the government in paying the capital costs of infrastructure and servicing requirements. Recent studies by Mazon (2006), Fodor (2009), and Buxton, (2008) suggest that the economic benefits of resort style developments, from a fiscal perspective, often outweigh the long-term infrastructure and servicing costs of such developments. DCCs are one way that local governments can recoup these servicing costs.

This research did not specifically explore the extent to which DCC's sufficiently fund infrastructure and servicing costs of new developments in Fernie. The City should ensure, through a fiscal policy analysis, that its new residential tourism developments are economically viable. This is particularly the case with resort style developments which often occur on the outskirts of communities and are more difficult and costly to service (NWCCOG, 2006; Sierra Club, 2000).

Fernie's existing DCC bylaw is extensive and requires developers to pay DCCs for infrastructure and servicing related to water, sanitary sewer, transportation, and stormwater infrastructure. In addition, the City levies a \$67.55 'cost per population' fee for the development of parks. This 'park' charge if implemented effectively, is a good step towards enhancing Fernie's QoL through park and protected area development.

As a designated resort area, Fernie has the ability to leverage DCCs to pay the capital costs of providing, constructing, altering or expanding employee housing for resort workers. Affordable employee housing would work to alleviate housing affordability issues and also help Fernie maintain a stable population and workforce by creating opportunities for a wider range of income earners, particularly tourism industry employees.

5.5.4 Fernie's Economic Development Strategy

In 2009, the City of Fernie began the creation of an economic development strategy with an 'Economic Development & Opportunity Identification Forum' (Mike Stolte & Associates, 2009). The results of this forum suggested that the development of light industry, specifically information technologies (IT) and telecommunications were a

significant economic opportunity for Fernie. Fernie's OCP also recognizes this potential (City of Fernie, 2003, section 16.3) and includes policies to encourage the development of internet and digital cellular telephone technology in an effort to attract new business. The results of this research support the existing direction of Fernie's economic development policies with respect to enhancing IT and telecommunications technology. Economic development policies should exploit the significant opportunity of facilitating increased RT visits, permanent amenity migrations and relocation of mobile firms to Fernie through these technological investments. Such policies should be clearly incorporated into Fernie's Economic Development Strategy.

Fernie's economic development strategy also identified another link with residential tourism; housing. The provision of affordable and attainable housing for students and local employees was identified as a necessary component of Fernie's economic success. Affordable housing options will attract new amenity migrants, ensure local employers can retain employees, and allow seasonal and long term workers and students to settle in Fernie permanently.

5.5.5 Tourism Development

Fernie recently became a designated 'resort municipality' which gives the City an increased ability to regulate new developments and to mitigate the impacts of residential tourism growth. In addition to Fernie's ability to impose DCC's for the development of affordable employee housing, Fernie now as a Destination Marketing Organization (DMO) which markets Fernie to the world. The goal of Fernie's DMO is to increase the "...number of overnight visitors to Fernie throughout the entire year who stay longer, spend more, and return and recommend Fernie again and again." (City of Fernie, 2009, p.4). Since becoming a resort community, Fernie has created a Resort Development Strategy (City of Fernie, 2009). This strategy identifies various tourism development opportunities which will be funded by the new resort transfer tax, including new and enhanced recreational trails, cultural tourism, and downtown revitalization, all of which are important QoL assets.

As Jaakson (1986) noted, many tourism destinations fail to recognize residential tourism as a component of the tourism industry. In Fernie's case, significant potential

exists to streamline residential tourism planning and connect it with tourism marketing and development initiatives which support and enhance the ski resort, recreation trails, and natural scenery which attract tourists and enhance QoL.

5.5.6 Quality of Life and Liveability Report

Fernie's OCP (2003) identified the importance of maintaining a high QoL for all Fernie residents. Subsequently, the City now tracks QoL and intends to annually produce a liveability report to guide the City's planning and policy decisions (City of Fernie, 2003). The first QoL and liveability report is slated for completion in the summer of 2010. This research makes a strong contribution to this initiative. It specifies the QoL features and services of Fernie which are most important to RTs, and also elucidates the perceptions of 23 key informants with respect to the benefits, challenges, and planning implications of residential tourism and QoL in Fernie. The results of this study should be incorporated into Fernie's QoL strategies and liveability report. Similar investigations should be repeated as necessary to ensure the views of Fernie's residential tourist population are incorporated into the liveability index.

CHAPTER 6: CONCLUSIONS

6.1 Research Summary

This research was situated within Gill and Williams (2008) 'Tourism-led Migration and the Transformation of Place' framework. The framework sought to understand the movements of people, capital, and knowledge into rural high amenity areas, and how such movements are transforming communities and landscapes. An outcome of the framework, and related research activity was the identification of regulatory and managerial approaches for contending with the transformative implications of tourism-led migrations.

This research examined the implications of residential tourism on the quality of life in Fernie. A case study assessment was supported by a survey of Fernie residential tourists (RTs), and interviews with community stakeholders in the Fernie area. The RT survey sought to create a profile of RTs that explained their QoL preferences. The RT survey answered the research questions "What are the socio-demographic and behavioural characteristics of RTs in Fernie?" and "What factors affect quality of life for Fernie's RTs?" Following the survey, key informant interviews explored the third research question "How do community stakeholders perceive the affect of residential tourism on quality of life in Fernie?" Finally a combination of RT and key informant information was used to answer the question "What are the policy and planning implications of residential tourism's affect on the QoL in Fernie?"

Overall, the findings suggest that residential tourism has brought several benefits to Fernie, along with some challenges. Benefits of residential tourism on the QoL in Fernie are substantial and include economic, social and environmental effects. RTs have helped to diversify Fernie's economy by providing shoulder season jobs outside the traditional resource and tourism industries; namely in the construction and renovation sector. Local area businesses have responded to significant demand from RTs and have broadened their operations to include a diverse offering of restaurants, grocery stores, and other specialty retailers. RTs have also brought new ideas and perspectives into Fernie which have added to the diversity and character of the town. For RTs, their quality of life is highly related to the quality of Fernie's natural environment and culture. This had led to a greater overall appreciation of these assets for some long time residents. In addition,

RTs are a highly affluent group with great potential to contribute to Fernie's social fabric and economy. Such opportunities could be significantly enhanced with a greater number of visit days, and/or permanent RT movements to Fernie.

The four most significant planning challenges for Fernie included:

1. The increased cost of housing;
2. The shift from a stable to a more transient population;
3. Negative environmental impacts tied to the siting and pace of new residential tourism developments, and
4. The loss of community and neighbourhood appeal resulting from unoccupied RT homes.

Several planning opportunities are available to mitigate the effect of these impacts. The most significant opportunities include: better leveraging of the human and social capital of RTs for community benefit, converting RTs to permanent residents, and using the preservation of natural and cultural quality of life amenities as an economic development strategy. Increased RT migration and greater attraction of young professionals, entrepreneurs, and mobile firms to Fernie could be facilitated by taking an 'amenity preservation' approach to planning. Planning efforts then could focus on enhancing social, cultural, and environmental amenities which attract and retain tourists, RTs, and amenity migrants. This planning approach could be supported by making investments in information, communalisation, and transportation technologies designed to attract mobile business and people. This amenity-based planning approach, unlike tourism and resource extraction, is less reliant on external economic factors and business decisions. The focus is on preservation of amenities which are largely under the control of local government. Furthermore, the amenity industry is extremely diverse as you could attract mobile firms and people whom are employed in a multitude of different industries.

Fernie's natural and cultural amenities will continue to attract permanent and non-permanent amenity seekers to the community. Understanding the scope and scale of residential tourism, and potential impacts on quality of life will ensure Fernie's amenities remain intact in order to continually draw tourists, RTs, and amenity migrants. Rural tourism areas across BC, and across the globe, can learn from the findings of this research. There is significant potential in harnessing the benefits of residential tourism by creating an 'amenity preservation culture' from which to base all decisions. This means

considering the new amenity industry decisions ranging from infrastructure and housing, to residential, commercial, and industrial development. Such an approach can be employed in rural tourism areas to promote and protect unique attributes of the place and ensure a vibrant and sustainable community for future generations.

6.2 Considerations for Future Research

The results of this research contribute significantly both to the theoretical and applied aspects of planning for tourism-led migrations in rural tourism areas. However, information gaps and methodological improvements are available. Potential improvements and gaps for further research are outlined below:

6.2.1 Future Survey's Targeting Residential Tourists:

- The survey targeted RTs specifically to determine QoL perspectives. However, the importance of understanding permanent population perspectives in the planning process cannot be overstated. Permanent residents were not surveyed due to budgetary constraints, and the City of Fernie's future plans to survey permanent residents in the QoL planning process;
- The RT survey identified that 27 percent of RTs were planning to move permanently to Fernie. An interesting complement to this, and to understanding barriers to permanent movement, could involve probing reasons for not moving permanently to Fernie;
- The RT survey did not identify RT behaviour with respect to spending in the community. Economic analyses of RT spending habits, coupled with economic impact studies of residential tourism developments, would allow for a detailed analysis of the economic contributions of RTs in Fernie.

6.2.2 Further Research for Fernie and Resort Tourism Areas:

- The results of this research suggest that RTs have a significant influence on the local economy in Fernie. A detailed economic analysis, similar that outlined by Lloyd Levy Consulting (2004) would create a better understanding of the long term costs and benefits of resort-style developments in rural areas.
- Mazon (2006), Fodor (2009) and Buxton (2008) determined the long term cost of servicing and infrastructure for resort-style developments is often inadequate to cover the taxes and DCCs which municipalities gain from these developments. Fernie and other tourism areas should conduct detailed fiscal analyses of large residential tourism developments to ensure long term benefits outweigh costs.

- Fiscal analyses should be coupled with non-market valuations of Fernie's natural amenities-particularly with respect to understanding how RTs and permanent resident values such amenities (trails, viewscapes, etc.). This could be done using a non-market 'willingness to pay' or 'willingness to accept compensation' type analysis.
- Further research should be done to test Marjavaara's (2007) 'displacement myth theory'. That is, to determine the extent to which declines in Fernie's permanent population resulted from the residential tourism -driven escalation in housing costs. Such a study would involved analyzing historical out-migration patterns in Fernie.
- Although past studies have discussed RT community involvement levels, no studies were found which focus on solutions for increasing RT involvement in the host community. Such a study would involve assessing RT needs and involvement constraints to identify gaps and potential programs and policies to address gaps.
- Studies were not found which identified methods for getting RTs to visit their recreational homes more often. This is an information gap for tourism area planning which could be addressed through further surveys and interviews in RTs in tourism destinations.
- Fernie should conduct further research and analysis to determine how the City can best capitalize on the knowledge-based industry and attract mobile firms and people to live and do business in Fernie.

6.2.3 Theoretical Investigations:

- This research highlighted the current discrepancies across various academic disciplines with respect to defining tourism, residential tourism, and amenity migration. Figure 3 attempted to clarify and provide a definitional framework for future research in this field. Future research should critique and expand on Figure 3 in an attempt to create consistency across academic disciplines with respect to specifically defining the new group of mobile people who reside permanently, intermittently and temporarily in tourist destinations.
- Sheller and Urry (2006) argued that human populations are becoming increasingly mobile. The conclusions of this research assume this assertion to be true, and that this mobility is an opportunity for rural tourism development. Further explorations regarding the increased mobility of people and business is essential to further recognize this potential as a development opportunity for rural tourism areas.
- Within Gill & Williams (2006), "Tourism-led Amenity Migration in the Transformation of Place" Framework, this research did not directly explore the process of stakeholder engagement in decision-making or the nature of the power relationships between stakeholders in the residential tourism development process. Such a theoretical investigation would help local decision makers understand the influence of power and politics in Fernie's decision-making arena.

APPENDICES

Appendix A - Survey Instrument

Section 1- Your property in Fernie...

1. If you are taking this survey, it is assumed that you own property in Fernie, but reside somewhere else. Where is your primary place of residence located? (*city, country*)_____
2. Not including your primary residence, and your Fernie property, do you own real estate elsewhere? If so, where? (*list all properties - city, country*)_____
- 2a. Do you own more than one property in Fernie? (*Select one*)
 - Yes
 - No
3. When did you purchase your Fernie property? (*YYYY / MM*)_____
4. Do you consider this property primarily: (*Select one*)
 - An investment
 - A vacation property
 - An eventual retirement residence
 - A corporate use residence
- 4a. In Fernie, do you own...(Select one)
 - Property with no home on it (land only) [skip to question 13]
 - Property with a home
5. Which of the following best describes your residence in Fernie? (*select one*)
 - Single family home
 - Duplex/ triplex/ fourplex
 - Townhouse
 - Condominium
 - Mobile home
 - Other
6. What is the **current use** of your property?
 - Owner use only
 - Owner, friends and family
 - Full time rental
 - Part time rental
 - Corporate use
 - No use
 - Other_____

7. Which of the following statements most accurately represents your **intended future use** of this residence? (*Please check all that apply*)
- Maintain current use
 - Increase personal use
 - Decrease personal use
 - Increase use by friends and family
 - Sell and buy another property in Fernie
 - Sell and move away from Fernie
 - Sell without buying another property
 - Become full-time resident and work in Fernie
 - Retire in Fernie and use as a retirement residence
 - Other_____
8. Please estimate the **total number of days** in which your residence was occupied by you, your friends, or family in the **last 12 months**. Do not include rental use. (*Check one*)
- None
 - 0-7days
 - 8-14 days
 - 15-29 days
 - 30-59 days
 - 60-89 days
 - 90-129 days
 - 130-300 days
 - 300+ days
9. Please estimate the number of days your Fernie residence is occupied by you, your friends, or family in the following seasons: Do not include rental use (*specify the appropriate number of days for each season*)
- December – March_____
 - April – June_____
 - July – August_____
 - September – November_____
10. When your residence is occupied by you, your friends and/or family, on average how many people usually stay there? (*Specify the average number of people*)_____
11. If you rent your residence or a portion of your residence to someone else, please estimate the number of days per year that you rent out in the following seasons (*specify the number of days for each season*):
- December – March_____
 - April – June_____
 - July – August_____
 - September – November_____

12. If you do not rent your residence to someone else, please explain **why**?

- No financial interest in renting
 - Costs of renting outweigh benefits (advertising, logistics, landlord duties, etc.)
 - I enjoy the flexibility of using the property when I want
 - I use the property often enough that renting is not an option
 - I do not want people I don't know to occupy my home
 - Other (explain)
-

Section 2 – Your Attraction to the Fernie area

13. How important were the following attributes in your decision to purchase property in Fernie? *(Select one box for each item - not at all important, somewhat important, important, or very important)*

	Not at all important	Somewhat important	Important	Very Important
Golf courses				
Mountain biking trails				
Hiking trails				
Fishing opportunities				
Proximity to ski resort				
Proximity to lakes				
Historic downtown				
Proximity to permanent residence				
Job opportunity				
Friendliness of community				
Healthy environment				
More affordable than other mountain resorts				
Proximity to friends and family				
Safe community/ neighbourhood				
Climate				
Small town atmosphere				
High quality of life				
Natural scenery				
Mountain community culture				
Sense of community				
Other (specify)				

14. Prior to purchasing your Fernie property, what initially brought you to the Fernie area? *(check all that apply)*

- I did not visit Fernie prior to purchasing my property
- Visiting friends and relatives

- Business travel
- Passing through on my way elsewhere
- Downhill skiing
- Biking trip
- Golfing trip
- Hiking trip
- Cat skiing holiday
- Fishing trip
- River sports (kayaking, canoeing)
- Camping
- Arts and cultural event/ attraction
- Visiting lakes
- Fernie was recommended to me by a friend or relative
- Other (specify)_____

15. How likely are you to recommend Fernie as a lifestyle destination to others?
(please rank on a scale from 1 to 10: 1 being not likely to recommend and 10 being very likely to recommend) _____

Section 3 - Your involvement in Fernie activities...

16. How do you find out about community events and activities in Fernie? *(Check all that apply)*

- Fernie Free Press
- Internet
- Posters and flyers located around the community *(coffee shops, grocery store, etc.)*
- Arts Station E-news
- The Fernie Guide
- Chamber of Commerce
- Fernie Fix
- Word of mouth
- Radio
- Other *(specify)*_____
- None

17. Are you involved with any community groups (church, environmental, arts, political, outdoor, sports, etc.) in Fernie? *(If 'yes', specify the group(s) you are involved with)*

Yes	Specify_____
No	

18. Please specify any arts, cultural, or recreational activities you would like to see offered in Fernie?_____

19. Which of the following activities have you been engaged with in Fernie in the last 12 months? (check the box next to each item you have engaged in)

Attended a council meeting	<input type="radio"/>
Voted in Fernie's municipal election (BC residents only)	<input type="radio"/>
Volunteered in the community	<input type="radio"/>
Worked for a local business or other organization	<input type="radio"/>
Attended a Community event (e.g. Taste of Fernie, Griz Days, etc.)	<input type="radio"/>
Attended a sporting event (e.g. Ghost rider game)	
Attended a neighbourhood activity	
Attended another community activity (specify)_____	<input type="radio"/>

20. Which of the following factors restricts you from participating more in community groups, events, and activities while in Fernie? (Check all that apply)

- I participate often enough in community events and activities in Fernie
- I am not in Fernie often enough
- Fernie is my vacation time, I am not very interested in attending community events
- I have community groups and activities that I participate in at my primary residence
- I am unaware of times and locations of events and activities in Fernie
- I have no interest in the activities/events offered in Fernie
- I have time restraints and other commitments
- Other (specify)_____

Section 4- Your Perception of the Quality of Life in Fernie...

21. Please describe what a good quality of life in Fernie means for you?

22. In your opinion, how important are the following features to your quality of life in Fernie? (For each item, indicate: Unimportant, somewhat unimportant, in the middle, somewhat important, or important. Please take your time and consider each option)

	Unimportant	Somewhat unimportant	In the Middle	Somewhat important	Important
Parks and protected areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vibrant downtown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community events and festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economic diversification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walkability of the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Traffic and congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small town atmosphere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The natural scenery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trails (hiking, biking, skiing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping and retail options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Types of development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rate of community growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Habitat for wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agricultural land protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local food production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sense of community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appearance of the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety and security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. Related to the previous question, how satisfied are you with the current state of these features, in terms of fulfilling your quality of life Fernie? *(For each item, indicate: Unsatisfied, Somewhat unsatisfied, In the middle, Somewhat satisfied, Satisfied. Please take your time and consider each option)*

	Unsatisfied	Somewhat unsatisfied	In the Middle	Somewhat satisfied	Satisfied
Parks and protected areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vibrant downtown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community events and festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economic diversification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walkability of the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traffic and congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small town atmosphere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The natural scenery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trails (hiking, biking, skiing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping and retail options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Types of development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rate of community growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Habitat for wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agricultural land protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local food production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Sense of community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appearance of the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety and security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 5- Services in the City of Fernie

24. How important are the following **services** to your quality of life while in Fernie?
(For each item, indicate: Unimportant, somewhat unimportant, in the middle, somewhat important, or important. Please take your time and consider each option)

	Unimportant	Somewhat unimportant	In the Middle	Somewhat important	Important
Health care/ hospitals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Police protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Road maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf course	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garbage disposal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ski resort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drinking water quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recreational facilities (e.g. aquatic centre, skating rink, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community sidewalks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning and zoning regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Services for the disabled	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. How satisfied are you with the provision of these same services in Fernie? *(please specify very dissatisfied, somewhat dissatisfied, in the middle, somewhat satisfied, very satisfied, or unsure)*

	Very dissatisfied	Somewhat dissatisfied	In the Middle	Somewhat satisfied	Very satisfied	Unsure
Health care/ hospitals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Police protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Transportation						
Road maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf course	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garbage disposal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ski resort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drinking water quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recreational facilities (e.g. aquatic centre, skating rink, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community sidewalks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning and zoning regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Services for the disabled	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 6 - About you:

26. Are you: *(Check one)*

Male	<input type="checkbox"/>
Female	<input type="checkbox"/>

27. In which age category are you? *(Check one)*

Below 29	<input type="checkbox"/>
30-39	<input type="checkbox"/>
40-49	<input type="checkbox"/>
50-59	<input type="checkbox"/>
60-69	<input type="checkbox"/>
70 -79	<input type="checkbox"/>
80+	<input type="checkbox"/>

For the following questions you are adult #1. If you are married or have another adult living at your permanent residence please provide their information under Adult #2.

28. What is your employment status? *(Select one for each adult)*

Adult #1
 Full time employed
 Part time employed
 Retired

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Adult #2
 Full time employed
 Part time employed
 Retired

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Looking for work	<input type="checkbox"/>	Looking for work	<input type="checkbox"/>
Self employed	<input type="checkbox"/>	Self employed	<input type="checkbox"/>
Student	<input type="checkbox"/>	Student	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	Other _____	<input type="checkbox"/>

29. If employed, in what industry? *(Select one for each adult)*

Adult #1		Adult #2	
Resource industry	<input type="checkbox"/>	Resource industry	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Construction	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Manufacturing	<input type="checkbox"/>
Wholesale trade	<input type="checkbox"/>	Wholesale trade	<input type="checkbox"/>
Retail trade	<input type="checkbox"/>	Retail trade	<input type="checkbox"/>
Finance and real estate	<input type="checkbox"/>	Finance and real estate	<input type="checkbox"/>
Health care and social services	<input type="checkbox"/>	Health care and social services	<input type="checkbox"/>
Business services	<input type="checkbox"/>	Business services	<input type="checkbox"/>
Educational services	<input type="checkbox"/>	Educational services	<input type="checkbox"/>
Other (specify) _____	<input type="checkbox"/>	Other (specify) _____	<input type="checkbox"/>
Not employed	<input type="checkbox"/>	Not employed	<input type="checkbox"/>

30. What level of education have you completed? *(Select one for each adult)*

Adult #1		Adult #2	
Less than high school	<input type="checkbox"/>	Less than high school	<input type="checkbox"/>
High school diploma	<input type="checkbox"/>	High school diploma	<input type="checkbox"/>
Apprenticeship or trade certificate/ diploma	<input type="checkbox"/>	Apprenticeship or trade certificate/ diploma	<input type="checkbox"/>
College or other non- university diploma/certificate	<input type="checkbox"/>	College or other non- university diploma/certificate	<input type="checkbox"/>
University certificate/ diploma	<input type="checkbox"/>	University certificate/ diploma	<input type="checkbox"/>
University Bachelor's degree	<input type="checkbox"/>	University Bachelor's degree	<input type="checkbox"/>
Post graduate degree	<input type="checkbox"/>	Post graduate degree	<input type="checkbox"/>

31. Please indicate if your annual household income is: *(Check one)*

Less than \$50,000	<input type="checkbox"/>
\$50,001 - \$100,000	<input type="checkbox"/>
\$100,001 - \$150,000	<input type="checkbox"/>
\$150,001 - \$200,000	<input type="checkbox"/>
\$200,001 - \$250,000	<input type="checkbox"/>
More than \$250,001	<input type="checkbox"/>

32. If you have any other perspectives you would like to submit with this survey, please feel free to report them in the space provided here:

Appendix B - Postcard Layout

Postcard front:



Postcard back:

Greetings from the City of Fernie!

We are conducting a survey of home owners in Fernie to develop a Community Quality of Life Index. The Index is part of a larger planning project examining the community's overall liveability for both part-time and full time residents. I am a graduate student at Simon Fraser University working with Fernie to develop this Report.

By completing this short survey you will be entered into a draw to win a spa getaway package for 2 at Island Lake Lodge Resort worth over \$1000!

Visit www.fernie.rem.sfu.ca to complete the survey
Good luck!

If you would like a paper copy of the survey mailed to you please contact Jeff Zukiwsky at 778-786-1623 or at 403-770-9125

Cover: Painting by Fernie artist Keya White- keya@photoscapes.ca

Return: Jeff Zukiwsky
#11 Mt. Herchmer Ave.
Fernie, BC
V0B 1M3

Name
Address
Survey Access Code

Appendix C - Key Informant Interview Guide

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 tourists and amenity migrants shape the development of rural communities. My specific research examines how residential tourism is shaping Fernie. In this work, residential tourists are those who own property in Fernie, permanently reside elsewhere, and use their place for holiday and/or vacation purposes (second home owners).

In collaboration with the City of Fernie, and its quality of life committee, I recently conducted a survey of residential tourists in Fernie. It examined residential tourist's visiting patterns, involvement in the community, and feelings about Fernie's quality of life. I would like to share some of these results with you, and get your perspectives on how you feel residential tourism is affecting Fernie's quality of life, and what planning strategies are needed to capitalize on the contributions these people can make to our community.

My general research questions are summarized here:

1. What effects does residential tourism have on the quality of life in Fernie?
2. What are the appropriate planning and management responses to residential tourism in Fernie?

Topic 1- Benefits and Impacts of Residential Tourism in Fernie

1. In your opinion, what are the most significant quality of life benefits of residential tourism in Fernie?
 - a. Economic benefits? (e.g. higher spending power, new business opportunities, increased tax base)
 - b. Social benefits? (e.g. broader range of services, enhanced infrastructure)
 - c. Environmental benefits? (e.g. increased awareness and/or sensitivity)
2. In your opinion, what are the most significant negative effects of residential tourism on the quality of life in Fernie?
 - a. Economic impacts? (e.g. low utilization of homes, foreign business/property ownership, infrastructure requirements)
 - b. Social impacts? (e.g. housing affordability, sense of community, trust, tensions between residential tourists and permanent residents)
 - c. Environmental impacts? (e.g. visual quality and landscape change, resource consumption)

Topic 2- Residential Tourism and the Quality of Life in Fernie

3. In my survey, Fernie's environmental attributes were identified as the most important contributor's to the town's quality of life. Do you share the same feelings about the relative importance of these assets to your quality of life in Fernie?
4. In my survey with residential tourists, the most important Fernie area services to their quality of life were: (1) Drinking water quality, (2) The ski resort, (3) Health care/ hospitals. Do you share the same feelings about the relative importance of these assets to your quality of life in Fernie?

Topic 3- Planning and Management of Residential Tourism in Fernie

5. In the City of Fernie, about 37% of residential properties are owned by those living outside the Fernie area (1044 of 2804 residential properties). My survey results suggest that about 32% of all Fernie properties are occupied by residential tourists.
 - a. What would be the ideal proportion of residential tourists to permanent residents in Fernie?
6. Since 1981, Fernie's permanent population has been on a steady decline (from 5,444 in 1981 to 4,217 in 2006). At the same time, it is likely that Fernie's seasonal (resort workers) and part-time (residential tourists) population has increased substantially.
 - a. How would you describe the link between residential tourism and Fernie's population trend?
 - b. Can you indicate what you feel are the short and long term effects of this population shift for Fernie's quality of life and sustainability?
7. For many tourism communities the low use of residential tourists' properties means potential economic losses for the community. In my survey, residential tourists occupied their homes an average of 65 days per year. In addition, 17% of respondents rent their property, or a portion of their property, on a part-time basis when not in Fernie.
 - a. From your perspective, is it desirable to increase the occupancy days of RT properties in Fernie?
 - b. If so, there are at least 3 ways in which this can be achieved: 1) increasing the number of days per year that RTs visit Fernie, 2) facilitating the permanent movement of RTs the Fernie, or 3) encouraging RTs to rent out a suite in their property or rent out their entire property when it is

unoccupied. Which of these strategies do you feel is appropriate for Fernie? How could that strategy be achieved?

8. Real estate development has been a growing business in Fernie. The City's housing needs assessment (2007) concluded that "The private market is primarily building...homes...for higher income earners, many of whom are second home and recreational purchasers. This is a natural market response to obvious demand and is likely to continue"
 - a. Can you comment on the sustainability of Fernie's current residential tourism development model (i.e. the construction, marketing, and sale of vacation homes to non-residents)?
 - b. If possible, in what ways could current development patterns be changed to increase benefits to the community?
9. Do you have any other comments you would like to add about the effects of residential tourists in Fernie?

Appendix D - Mean and Standard Deviations for Importance-Satisfaction Scores

	Importance		Satisfaction	
	Mean	Standard Deviation	Mean	Standard Deviation
Drinking water quality	4.872	0.377	4.319	0.939
The natural scenery	4.827	0.429	4.870	0.417
Trails (hiking, biking, etc.)	4.782	0.448	4.570	0.661
Safety and security	4.697	0.550	4.439	0.738
Ski resort	4.660	0.756	4.272	0.973
Parks and protected areas	4.584	0.673	4.382	0.663
Appearance of the town	4.563	0.582	4.096	0.882
Health care/ hospitals	4.557	0.675	4.199	0.905
Walkability of the community	4.485	0.806	4.347	0.795
Recycling	4.431	0.893	3.636	1.206
Police protection	4.412	0.805	4.175	0.901
Recreational facilities	4.369	0.932	4.443	0.784
Small town atmosphere	4.366	0.831	4.608	0.641
Habitat for wildlife	4.358	0.825	4.197	0.859
Community sidewalks	4.331	0.930	3.812	1.034
Sense of community	4.223	0.837	4.076	0.818
Vibrant downtown	4.154	0.970	3.798	0.901
Road maintenance	4.088	0.855	3.750	0.992
Garbage disposal	4.059	1.061	3.928	1.057
Community events and festivals	3.985	0.910	4.020	0.808
Planning and zoning regulations	3.936	1.039	3.528	0.903
Arts and culture	3.846	1.040	3.907	0.815
Housing affordability	3.801	1.020	3.432	1.017
Shopping and retail options	3.792	0.928	3.844	0.911
Traffic and congestion	3.770	1.133	4.345	0.780
Types of development	3.668	1.009	3.454	0.843
Library	3.667	1.297	4.149	0.971
Agricultural land protection	3.617	1.232	3.751	0.919
Economic diversification	3.607	1.063	3.440	0.859
Rate of community growth	3.595	1.066	3.551	0.881
Local food production	3.550	1.226	3.547	0.885
Golf course	3.409	1.514	4.084	0.942
Services for the disabled	3.221	1.330	3.366	0.797
Education opportunities	2.328	1.363	3.511	0.844
Public Transportation	2.246	1.218	3.389	0.920
Child care	1.931	1.388	3.329	0.958

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