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Rural Tourism and Recreation on Private Land in Alberta:
The Case of Alborak Stable

BY

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A MASTER'S DEGREE PROJECT SUBMITTED TO
THE FACULTY OF ENVIRONMENTAL DESIGN,
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ABSTRACT

Rural Tourism and Recreation on Private Land in Alberta: The Case of Alborak Stable

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May, 1999

Prepared in partial fulfilment of the requirements of the M.E.Des. degree in the
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Dr. Richard Levy, Supervisor

Rural Tourism and Recreation (RTR) is defined here as activities engaged during leisure time located in rural areas and focuses on the areas that lie between the outer edge of the urban fringe and the wilderness. The study recognizes several forces that are contributing to an increase in demand for access to rural areas. Additionally, it acknowledges a changing agricultural industry that is seeking new alternatives to diversify farm incomes. Specifically, the study addresses planning issues related to family-based RTR enterprises and evaluates factors that influence the supply of privately owned land for recreational use.

The thesis of this work is that the development of RTR enterprises is highly contextual and thus requires special planning considerations. Two methods of research are employed: a literature review and a case study. The case study is from the prospective of the host family as the author is a member of the host family.

The study proposes that there are numerous variables that should be considered in RTR development. These variables are then grouped into eight categories and include (1) Access; (2) Competition for Rural Resources; (3) Attractions, Amenities, and Activities; (4) Social Interaction; (5) Physical Environment; (6) Business Skill and Knowledge; (7) Finance and Economics and (8) Public Policies. Each of these criteria is reviewed in the literature and case study. This study focuses on issues that RTR enterprise developers should consider. Additionally, it provides information that could be used by public authorities in determining recreational land use strategies and establishing policies.

The study found that farm owners consider developing RTR enterprises primarily for the lifestyle and to supplement farm income. The greatest barriers to development are the securing of financing and the managing of land-use conflict. The study proposes that an underlying challenge to the development of sound RTR policies is a lack of integration of various government agencies and authorities. Recommendations are proposed for landowners and public authorities on issues such as access, business skill and knowledge, the physical environment, financing, and public policy direction.

Key Words:

Rural Tourism; Family-based business; Agri-tourism; Farm Tourism; Farm Diversification; Activity-based tourism; Countryside Recreation; Countryside Tourism; Rural Planning; Rural Image

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CHAPTER 1: INTRODUCTION

This Masters Degree Project focuses on Rural Tourism and Recreation (RTR) enterprises on private agricultural lands. Specifically, it evaluates factors that influence the supply of privately owned land for recreational use. This study endeavours to reveal many of the issues surrounding RTR and establishes a set of criteria that should be considered in assessing the merits of these enterprises.

The context of this study is rural Alberta. Many of the issues raised in the study are likely transferable to other environs; however, the types of rural tourism may vary substantially from place to place. The differences in types of RTR enterprises are a result of many factors such as climate, geography, and land use. For example, studies conducted in British Columbia identify wineries and orchards as having a high RTR potential. In contrast, Alberta offers opportunities on ranches, farms and in small towns. Although there are issues that are particular to these types of RTR enterprises, it is anticipated that many of the issues raised in this study would also apply to other environs. Specifically, this study focuses on RTR enterprises on farms and ranches. More than 51 million acres of land in Alberta are presently used for crop and livestock production by

over 59,000 farms.¹ As non-family corporations operate less than 1% of Canadian farms,² this project focuses on family operations.

1.1 Focus of RTR Development

Rural economies are in a transitional stage and are under the influence of change. These forces of change have the potential to dramatically alter the rural landscape. Conventional farming and natural resource based land-use has traditionally existed with limited land-use conflict. New and emerging trends, however, have the potential to create an increasing amount of friction. Trends in rural areas include increases in rural non-farming; intensive livestock operations; specialized crops and/or livestock operations; and an increase in oil and gas recovery. Potential conflicts between these various uses are evident. An intensive livestock operation, for example, clearly conflicts with residential land uses. The rural economy, however, is unstable and farmers are looking to diversify, specialize, or intensify operations to increase farm revenues.³

This project studies a specific RTR enterprise that has developed on private land and the land-use issues that surrounded its development. The case study is based on a recreational equestrian facility that was built in 1997 and 1998. The RTR enterprise is called "Alborak Stable" and is located 35 km west of Calgary, just south of the TransCanada Highway and 15 km north of Kananaskis Country.

¹ Statistics Canada <http://www.agric.gov.ab.ca/economic/census/abfarms.htm>

² Troughton, M. (1992). "The Restructuring of Agriculture: The Canadian Example," in Bowler, Bryant and Nellis, *Contemporary Rural Systems in Transition*, vol. 1, p. 36.

³ Troughton, M. (1992). "The Restructuring of Agriculture: The Canadian Example," in Bowler, Bryant and Nellis, *Contemporary Rural Systems in Transition*, vol. 1, p. 40.

The principal recreational activity that takes place on the site of Alborak Stable is horseback riding, however, the location is also suited to various other recreational pursuits including hiking, wildlife viewing and canoeing.

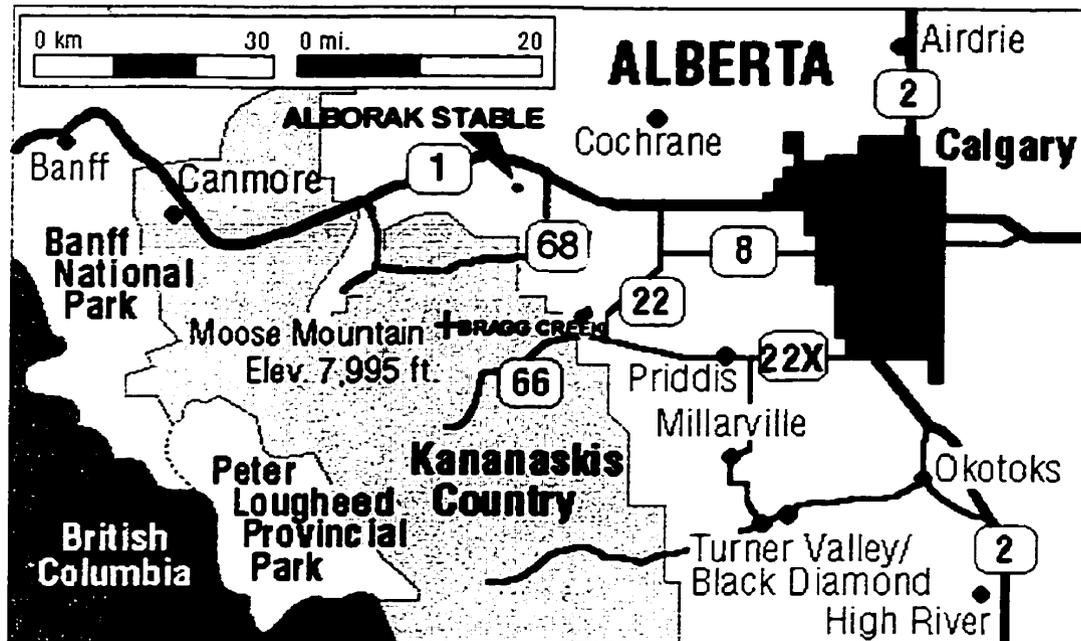


Figure 1.1 Provincial Context Map

The case of Alborak Stable has been chosen because:

- (1) It is a development that has occurred in a previously undeveloped area and has traditionally been used for summer range for cattle. It is also a development that has a high capital investment and thus it has higher risk.
- (2) The literature review, and the findings of Curry in particular, revealed that RTR should be contained in areas of low agricultural quality environment and where developments do take place, be in tandem with farm diversification. As will be shown in the case study, the

development of Alborak Stable is in an area of low agricultural quality environment and is in tandem with farm diversification.

- (3) The subject lands are currently under agricultural use; however, the land is severely limited in its agricultural capacity.
- (4) The subject lands are within MD of Bighorn boundaries, a rural municipality that is undergoing numerous development pressures from various industries including agriculture, tourism, recreation, mineral extraction, and forestry. The case study chosen is affected by all of these industries as they all occur within the vicinity of Alborak Stable.

These reasons for using Alborak Stable as a case study are consistent with the current literature on case study methodology. The literature offers three rationales for its use: (1) the case is *critical* in that it tests a well-formulated theory; (2) the case is *extreme* or *unique*; (3) the case is *revelatory* in that the investigator has the opportunity to analyze a situation that has been previously inaccessible.⁴

⁴ Feagin, J., Orum, A., & Sjoberg, G. (1991). A Case for the Case Study. The University of North Carolina Press. p. 4. Stewart, A. (1998). The Ethnographer's Method. Sage Publications, London. p. 5-8., Robson, C. (1993) Real World Research. Oxford. p.148, and Yin, R. (1994) Case Study Research Design and Methods. Sage Publications, London. p.9.

1.2 Objectives

The purpose of this Masters Degree Project is to determine the principal issues surrounding Rural Tourism and Recreation (RTR) on privately owned agricultural land. Specific objectives are:

- To determine principal planning issues that should be analyzed when considering the RTR enterprise development on privately held farmland.
- To conduct a case study on an existing RTR enterprise and assess how it was able to address various planning issues.

1.3 Methodology

This Masters Degree Project explores the merits of Rural Tourism and Recreation (RTR) on private land through two complementary methods of investigation. First, a literature review of sources relevant to RTR is engaged and second, a case study analysis of an existing RTR enterprise is conducted. The literature review was conducted using journals, conference proceedings, books, and electronic sources. This Case Study endeavours to provide the reader with insights into the principal factors that led to the development of the enterprise, the barriers to its development (and future expansion), and factors that were key in its success.

The investigator has been an active participant in the development of the case study enterprise and is a member of the host family. Accordingly, an unavoidable bias is introduced into the study and therefore there are some advantages and limitations associated with the analysis conducted. The perspective is advantageous in that it provides first-hand insight into interpersonal behaviour, motives, technical operations, and the specific context of the case. Conversely, it should be recognized that the analysis of the issues that surrounded the development are from the host family's perspective. Therefore, the study focuses on private sector interests. The role of the public sector is examined in its relationship to private sector development with the intention of providing public authorities with an awareness of the issues and frustrations felt by operators.

1.4 Organization of the Project

Following this introductory Chapter, Chapter Two commences with a general background discussion and literature review of RTR. First, terms are defined that are essential to the discussion and second, an overview of the driving forces of change in rural environments is provided.

Chapter Three addresses RTR enterprises on private land more specifically. Through a review of current literature, types of RTR enterprises are identified, motivations and barriers to RTR on private lands are delineated, and a list of criteria that should be considered when contemplating the development of an

RTR enterprise is established. This is accomplished by grouping issues revealed in the literature review into categories.

Chapter Four explores the case of Alborak Stable. The development of the enterprise is outlined and the principal issues that surround the development are discussed. This chapter provides the reader with an analysis of each of the criteria that are established in Chapter Three. The intent of this study is to provide the reader with a greater understanding of each of the criteria by defining these issues in terms of specific examples that were encountered in the case study. Chapter Five completes the work by outlining the principal findings of the study and making recommendations to be considered by potential RTR developers and public authorities.

There are three groups who may benefit from this study: (1) Recreationalists and/or tourists who desire recreational access to private land; (2) Authorities and Land-Use Planners that endeavour to facilitate various land-uses with minimal land-use conflict; and (3) Landowners and farmers who are considering hosting recreationalists or tourists on their land.

CHAPTER 2: A BRIEF OVERVIEW OF RURAL TOURISM AND RECREATION

2.1 Rural Tourism and Recreation (RTR)

This chapter will provide the reader with an overview of the principal issues that surround RTR. First, definitions for tourism, recreation, leisure, and RTR are outlined. Second, change in rural environments are identified and grouped into three driving forces: economic, technological and societal influences; changing patterns of recreation and tourism in rural areas; and changes in recreation and tourism activities. Last, the rural image and its importance to RTR is discussed.

This study is looking at one specific dimension of rural tourism: that which occurs on private lands. Defining Rural Tourism and Recreation (RTR), however, is challenging as there are a large number of complexities and evolving changes in rural environments.⁵ The basis for all rural tourism is its rural nature. The problem is - how do we define rural? Density is most often used to define rural areas, however, land use and social structures should also be considered.⁶ Recreational and country residential properties have been increasing in numbers

⁵ Lane, Bernard. (1994). "What is Rural Tourism?" Journal of Sustainable Tourism, Vol. 2, Nos. 1&2

at an alarming rate. In fact, the Municipal District of Rocky View, which borders the City of Calgary on three sides, was reported by the 1996 Canadian Census as the eleventh fastest growing municipality in Canada. While these areas are not at urban densities, the residents function socially in an urban manner and the land is not used in a manner that is consistent with traditional rural areas. At the other end of the spectrum, are wilderness areas with few, if any, inhabitants.

This study focuses on rural areas that are rural in terms of density and land-use. In Alberta, the predominant land-use of private rural land is for crop production and pasture for livestock. Other uses include resource extraction for oil, gas, gravel and forestry. Spatially, it focuses on the land that is between the outer edge of the urban fringe and the wilderness. This distinction is important as land-use in these areas is different and thus activities and issues surrounding RTR will be distinct.

2.1.1 Defining leisure, tourism and recreation

Other important definitions include leisure, tourism and recreation. Leisure is commonly held as time that is free from obligations.⁷ Recreation is activity (or deliberate inactivity) that is voluntary and is engaged during leisure time.⁸ Tourism, on the other hand, whatever definition is used, implies travel away from

⁶ Ibid.

⁷ Butler, R., Hall, C.M., and Jenkins, J. (1998). Tourism and Recreation in Rural Areas. John Wiley and Sons, England. pp. 3-4.

⁸ Ibid.

home and usually of periods greater than 24 hours.⁹ In the marketing context, these differences become more important as they represent different user groups. Many authors (Butler, Hall, Jenkin 1998, Knopf 1995, and Hunt 1995) have recognized that although tourism and recreation were once viewed as being fundamentally different, the differences between the two are diminishing. Many of the activities that are engaged during leisure, recreation and tourism are identical with the principal distinction between the activities being the location in which it takes place.¹⁰ This point is significant for RTR enterprises. These are two different market segments that are demonstrating similar demands. This implies that RTR enterprises have the potential to service both local recreationalists and tourists.

2.1.2 Defining Rural Tourism and Recreation (RTR)

A common misconception is that rural tourism is farm tourism. This is not necessarily the case. Farms and other agricultural pursuits may be seen as complementary to rural tourism, however, many rural tourism activities are not dependant upon farm situations.¹¹ In fact, "the actual farm environment seems to take back stage to other travel motives."¹² A calm relaxing environment, time at leisure, natural landscapes, and sporting facilities seem to be more important travel motives.¹³

⁹ Ibid.

¹⁰ Ibid.

¹¹ Lane, Bernard. (1994). "What is Rural Tourism?" Journal of Sustainable Tourism, Vol. 2, Nos. 1&2

¹² Oppermann, Martin. (1995) "Holidays on the farm: A case study of German hosts and guests," Journal of Travel Research Vol. 34, No.1

¹³ Ibid.

For the purposes of this Masters Degree Project, *Rural Tourism and Recreation*, is defined as activities engaged during leisure time in rural areas. This study focuses on private land in rural areas that are under agricultural production and focuses on RTR enterprises in particular. The term *enterprise* is used to signify a commercial or business component to the activities.

2.2 Recreation and Tourism in Rural Areas: Identifying Forces of Change

While this study concentrates on tourism and recreation on private lands, a brief discussion of rural recreation and tourism in the general sense provides the reader with the context and role in which this subtopic exists. There are numerous driving forces that are effecting tourism and recreation in rural areas. In their book, *Tourism and Recreation in Rural Areas*, Butler, Hall, and Jenkins, group these forces into three categories: Economic, Technological and Societal Change in Rural Areas; Changes in Recreation and Tourism in Rural Areas; and Changes within Recreation and Tourism. These variables, however, should be considered in concert with one another and not in isolation as their interaction produces a combined impact. The following section will outline each of these driving forces briefly.

2.2.1 Economic, Technological and Societal Change in Rural Areas

Rural economies have been in constant transition since the Industrial Revolution. Technological advances triggered initial changes to rural societies that would then be subject to societal and institutional influences. The technological advances and shift in population from rural areas to urban centres are perhaps viewed as the greatest influence on the rural landscapes. Continuing advances in technology have continued to have their effects on rural areas.

During the last 20 years in particular, rural areas have experienced numerous, often far-reaching economic, social and political/institutional changes which have had profound effects on the ways in which people in rural areas live and govern themselves.¹⁴

Scientific and technological advances have created efficiencies in rural based industries which has resulted in changes such as increased productivity of farm land; a decline in agricultural labour force; and new agricultural based industries.¹⁵ Institutional changes such as free trade, multi-national corporations, and governmental policies have had further impacts. Farm incomes in Canada have decreased substantially from 1973 to 1987 with net incomes falling from C\$8.6 billion to C\$2.0 billion (calculated 1986 constant dollars).¹⁶ In Alberta, total farm net income continues to fall with incomes decreasing 34% from 1993 to 1996 as shown in Table 2.1.¹⁷ Although cash receipts, are increasing, rising

¹⁴ Jenkins, Hall, and Troughton, "The Restructuring of Rural Economies," in Butler, R., Hall, C.M., and Jenkins, J. (1998). Tourism and Recreation in Rural Areas. John Wiley and Sons, England. p. 44.

¹⁵ Troughton, M. (1992). "The Restructuring of Agriculture: The Canadian Example," in Bowler, Bryant and Nellis, Contemporary Rural Systems in Transition, vol. 1, p. 29-42.

¹⁶ Ibid. p. 38.

¹⁷ Statistics Unit: Alberta Agriculture Food and Rural Development.
<http://www.agric.gov.ab.ca/economic/stats/income.html>

operating and depreciation expenses have contributed to the decline of long term viability and profitability of farms in Alberta.

Alberta Farm Income

	1993	1994	1995	1996	1996p/95
	(\$'000)	(\$'000)	(\$'000)	(\$'000)	Change (%)
Cash receipts	4,997,813	5,522,069	5,893,203	6,391,742	8.5
- Operating expenses	3,968,248	4,293,438	4,569,038	4,732,156	3.6
= Net cash income	1,029,565	1,228,631	1,324,165	1,659,586	25.3
+ Income in kind	23,641	23,853	23,246	22,991	-1.1
- Depreciation charges	744,112	793,182	852,144	907,300	6.5
= Realized net income	309,094	459,302	495,267	775,277	56.5
+ Value of inventory change	617,012	83,346	286,265	-162,020	-156.6
= Total net income	926,106	542,648	781,532	613,257	-21.5

TABLE 2.1 Source: Statistics Unit: Alberta Agriculture Food and Rural Development.

Changes in societal values has led to fragmentation of farm land surrounding urban centres to accommodate exurbanites who seek a *rural lifestyle* while commuting to their high paying jobs in city centres.¹⁸ Cities such as Calgary clearly illustrate this phenomenon. Located just west of the City limits are two communities known as Springbank and Bearspaw, which boast a *country lifestyle* on 2-4 acre lots with enormous homes.

Collectively these changes have led to new innovative farm operations including intensification, specialization, and diversification. Increased land values have made additional land acquisition unattainable, and have demanded that farmers seek alternative means of generating income. Many farmers have explored

agriculturally based strategies that include non-traditional foods such as ostrich, elk and buffalo; intensive feedlot operations; specialized crop production; and purebred or new breed development programs. The 1996 Canadian Census found significant increases in the number of non-traditional livestock operations since 1991. The number of goats have increased by 43%; the number of bison tripled from 15,775 in 1991 to 45,437 in 1996; and elk and deer farms account for some 69,000 animals. Additionally, farmers planted 47% more soybeans and over 100% more dry field peas in 1996 than they did in 1991. The census also showed that farmers are diversifying into culinary and medicinal herbs, ancient grains and greenhouse vegetables.

In some instances, farmers have begun to look towards alternative means to diversify or supplement their farm incomes. Statistics Canada found that in 1995, 15% of Canadian farm operators ran a business other than their farm. The highest proportion of farms operating non-farm businesses was found in British Columbia (23%) followed by Nova Scotia (19%) and Alberta (18%). The majority of the non-farm businesses reported are service-based (such as an accounting business or bed and breakfast) with 46% of the total. Other businesses include real estate, sales, construction, and manufacturing.

These statistics demonstrate an overall change in the rural economy. RTR enterprises emerge as a potential means for farmers to generate revenues on

¹⁸ Jenkins, Hall, and Troughton, "The Restructuring of Rural Economies," in Butler, R., Hall, C.M., and Jenkins, J. (1998). Tourism and Recreation in Rural Areas. John Wiley and Sons, England p. 51.

the farm with little disruption to the existing farm operations. It allows them to remain on the farm, or in close proximity to the farm, and develop a secondary business to supplement their income.

In short, global and regional economic, political, and social and technological developments have dramatically affected rural areas and led to their restructuring, usually involving an attempt to widen their economic base in which turning to tourism is often seen as part of a 'natural progression' towards a tertiarised economy.¹⁹

2.2.2 Changing Patterns of Recreation and Tourism in Rural Areas

A second driving force is the changing pattern of recreation and tourism in rural areas. For centuries in England and much of Europe, only the elite was able to afford the time to engage in RTR pursuits. "The bulk of the population had little leisure time and was too busy with survival and production to place great demands for leisure on the rural environment."²⁰ Those living in rural areas focused most of their leisure pursuits around the church, the market, and agricultural events.

Countryside estates of the European aristocracy were the exception. Known as the landed gentry, these groups engaged in hunting, fishing, walking, and riding. Fox hunting, in particular became the "quintessential recreational activity of the rural landed elite."²¹ Summer palaces of monarchs and summerhouses enabled elite groups to live in the country on a temporary basis. New worlds including

¹⁹ Ibid. p. 41.

²⁰ Butler, R., Hall, C.M., and Jenkins, J. (1998). Tourism and Recreation in Rural Areas. John Wiley and Sons, England.

pp. 8.

²¹ Ibid.

North America, New Zealand and Australia showed similar social order and rural recreation patterns.²²

In Canada, RTR is a new phenomenon, with only recent increases in demand for access to rural areas. Canadians have typically engaged in exurban tourism and recreation in wilderness areas beyond the rural areas.²³ The private cottage or cabin, located in wilderness areas, "epitomizes the Canadian vacation from the turn of the century until well after the Second World War."²⁴ Canadians continue to enjoy their cabins and cottages with Statistics Canada 1996 Census reporting that 6.8% of Canadian households own a vacation home accounting for some 740,000 second homes.

With the desire to leave the confines of the city on a more regular basis, new trends have arisen. We have observed the emergence of recreational residential properties, particularly in areas that are within commuting distance of urban centres: a modern reflection of old country estates.²⁵ With an increase in wealth and leisure time of the general population, recreation and tourism are thriving industries. We have witnessed the commercialization of tourism and recreation through the development of Bed and Breakfasts, campgrounds, and farm vacations.

²² Ibid.

²³ Butler and Clark (1992). "Tourism in Rural Areas: Canada and the United Kingdom," in Bowler, Bryant and Nellis, Contemporary Rural Systems in Transition, vol. 2, p. 167.

²⁴ Ibid.

²⁵ Ibid.

In general, activities that take place in rural areas require large tracts of land or water and either requires or is enhanced by the rural setting. Many activities such as skating and biking may be considered both a rural and urban activity. The principal ingredient that rural areas add to the participant's experience is setting.

The greatest implication of this change in rural recreation is the increase in demand for rural recreation and tourism activities by a large percentage of the population. The middle class enjoys many of these activities creating new and increasing pressures on rural areas adjacent to large urban centres.

2.2.3 Changes within Recreation and Tourism Activities

The third driving force on RTR is changes within recreation and tourism itself. Societal and technological forces have shifted the demand for various recreational and tourism activities. Roller skates once used in a leisurely manner have evolved to roller blades, which are being used in active recreation and sport in ways that perhaps the designer never anticipated. Clearly, this change in technology and use has had a great effect on pathways in urban parks and in some instances on paved trails in provincial recreation areas. Table 2.2 summarizes some of the principal differences in traditional rural recreational activities and the new, contemporary activities.

CHANGE IN RURAL RECREATION ACTIVITIES

Traditional Rural Recreation Activities	Contemporary Rural Recreation Activities
<p><i>Characterized by the following terms:</i></p> <ul style="list-style-type: none"> Relaxing Passive Nostalgic Traditional Low technological Non-competitive <p><i>Typical Activities Engaged:</i></p> <ul style="list-style-type: none"> Walking Picnicking Fishing Sightseeing Boating Cultural Horse riding Nature and farm based visits 	<p><i>Characterized by the following terms:</i></p> <ul style="list-style-type: none"> Active Competitive Prestige or fashionable Highly technological Modern Individual <p><i>Typical Activities Engaged:</i></p> <ul style="list-style-type: none"> Trail biking Off-road motor vehicle riding Orienteering Survival games Hang gliding Parasailing Jet boating Wind surfing Cross Country Skiing Horse Back Riding Adventure tourism Fashionable shopping in Small Towns

TABLE: 2.2 Adapted from Butler, Hall and Jenkins (1998)²⁶

Traditional rural activities are still engaged; however, there is an increasing demand for the new, contemporary activities. In many cases, the contemporary activities place a much greater demand on rural areas and often have a higher impact on the environment and surrounding areas. "Purpose built facilities, often usable for a single activity are regarded as essential, thus placing new demands on the rural resource base and bringing with them the likelihood of new forms of impact and conflict."²⁷ Golf courses are a prime example. A sport with gaining

²⁶ Butler, R., Hall, C.M., and Jenkins, J. (1998). Tourism and Recreation in Rural Areas. John Wiley and Sons, England. pp. 9-10.

²⁷ Ibid.

popularity, golf has created a demand for large tracts of land within rural areas. Competing for rural resources, golf courses require land and water which compete with traditional agricultural uses of an area. Use of fertilizers and traffic generated are further areas of conflict. Traffic problems are often underestimated. Urban golfers grow impatient with slow moving farm machinery on roads and demand a higher (paved) road standard.

Conflicts are also generated between the various forms of rural recreation. As the variety of activities increases to include the numerous contemporary recreational activities (as previously discussed and outlined in Table: 2.1), an increase in conflict between users is inevitable. For instance, hiking and fishing are incompatible with activities such as off-road motor vehicle riding and jet boating. Thus, as the spectrum of rural recreational and tourism activities increases, the potential for conflict between these activities increases and there is a greater demand for large recreational land areas.

2.3 The Rural Image

One of the greatest selling features of RTR is its location. In fact, "natural landscape is top ranked."²⁸ In addition to this physical image, the mental image of rural areas is also of fundamental importance. Hopkins, perhaps describes the importance of image best and thus is quoted at some length:

The 'countryside' is a place-image deeply entrenched in the geographical imagination of Canadians, an image that is

²⁸ Oppermann, Martin. (1995) "Holidays on the farm: A case study of German hosts and guests," Journal of Travel Research Vol. 34, No.1

fundamental to the promotion and consumption of rural tourism. In a nation where the population is overwhelmingly 'urban', the 'countryside' is some other place, a place spatially, temporally and psychologically distanced from the everyday urban life of most people. Distance enhances differences, be they real or imagined, and it is imagination that both inspires and sustains the construction of place-myths; the connoted, embellished identities attributed to places. In order to attract urban tourists, the rural tourism industry both promotes and aggrandize myths of rurality. Without such imagery the myths collapse, and with their demise, so falls a 'rustic' place that caters to the desires and imagination of urbanites, and more importantly, an industry that employs and profits.²⁹

As Hopkins suggests, this image is critical. What words can then be used to describe this image? In his Ontario study, Hopkins found that the myths or themes that operators most often promote relate to the natural environment, agriculture, recreation, and heritage.³⁰ These themes paint a romantic image of rural areas generating notions of nature, health, and revival of family roots or memories.

Research by Davies and Gilbert also attributes an increase in demand for farm tourism^{*} in Britain to its image. They identify three trends in society that have contributed to this increase: heightened environmental concern and awareness; increased desire for healthy, activity-based recreational pursuits; and an increase in pleasure trips that are of shorter distance and duration.³¹

²⁹ Hopkins, J. (1998). "Commodifying the countryside: marketing myths of rurality," in Butler, R., Hall, C.M., and Jenkins, J. *Tourism and Recreation in Rural Areas*. John Wiley and Sons, England. pp. 139.

³⁰ *Ibid.*, p. 146-155

* "Farm tourism" was defined in the article as *any tourist or recreation enterprise on a working farm*. This definition is viewed by the author as being sufficiently similar as to RTR as defined in this study for the purpose of assessing market demand.

³¹ Davies and Gilbert (1992). "Planning and Marketing Tourism: A case study of the development of farm tourism in Wales," *Tourism Management*, March, 1992, vol. 13, no. 1, pp. 58-59.

Operators may draw upon these rural myths to entice visitors to their RTR enterprise. More importantly, to be successful in the long-term, the experiences encountered must fulfil the mythical expectations of guests. The hosts of tourism and recreation enterprises provide the stage and setting for the experience to take place. The visitors are not simply observers but are actors who interact with the environment, fellow visitors, hosts, and setting. Every landscape viewed, activity engaged, sound heard, every touch and taste, together combine to create the RTR experience.

RTR operators, then, should focus their marketing efforts towards markets that place value on experiences that may be enjoyed in rural areas. However, there is very little research available. "The field of farm and rural tourism has hardly been explored."³² Refining the marketplace into specific targeted markets is further hindered as "few countries collect statistics in a way that separates purely rural from other forms of tourism."³³ What is known, is that there is an attraction by urbanites to the rural image. This characteristic is what distinguishes RTR from other types of tourism and recreation.

2.4 RTR and Sustainability

Sustainability is vital to the long-term success of RTR. While the issues that surround sustainability are great enough to warrant a complete study, an overview of the principles of sustainability are briefly outlined since RTR creates

³² Ibid.

³³ Lane, Bernard. (1994). "What is rural Tourism?" Journal of Sustainable Tourism Vol. 2, Nos. 1&2, 1994.

impacts on the social, economic and physical environments in which it takes place. These impacts must be effectively managed to ensure that the site of a RTR development is able to support it in the long-term.

There are many varying definitions for *sustainability*. This study interprets sustainability in its broadest sense. It considers three dimensions of sustainability: the economic environment, the social environment, and the physical environment. To be truly sustainable, activities should not compromise any of these environments for future generations.

Lane identifies the following five 'aims' for sustainable rural tourism development:

- (1) Sustain the culture and character of host communities;*
- (2) Sustain landscape and habitats;*
- (3) Sustain rural economy;*
- (4) Sustain a tourism industry which will be viable in the long term; and*
- (5) Develop sufficient understanding, leadership and vision among decision-makers in an area that they realise the dangers of too much reliance on tourism, and continue to work towards a balanced and diversified rural economy.³⁴*

Lane further recognizes that implementing these principles in a free market economy is problematic as there are numerous parties involved each with diverse aims and beliefs.³⁵

From a marketing perspective, it is important that rural areas maintain their rural *image* as this image is one of its principal attractions and is what distinguishes it

³⁴ Lane, B. (1994) "Sustainable Tourism Strategies: A Tool for Development and Conservation," Journal of Sustainable Tourism, Vol. 2, Nos. 1&2, 1994.

³⁵ *Ibid.* p. 103

from other types of tourism and recreation. "If rural tourism is special, if rurality in its many manifestations is a unique selling point, then great care must be taken to maintain rurality."³⁶ Perhaps the greatest threat to RTR in the long-term is its own impacts. The introduction of visitors to a rural area ultimately impacts the local economy, society, and physical environment and yet, it is the combination of these elements that combine to create the rural image the visitors have sought.

³⁶ Lane, Bernard. (1994). "What is rural Tourism?" Journal of Sustainable Tourism Vol. 2, Nos. 1&2, 1994. p. 20

CHAPTER THREE: LITERATURE REVIEW OF RTR ON PRIVATE LAND

The purpose of this chapter is to identify the various types of RTR enterprises; the motivations and barriers to RTR development; and provide an overview of the Alberta planning context. The chapter will conclude with an outline of factors that landowners should consider in determining whether or not they should become involved in an RTR enterprise.

3.1 Types of RTR Enterprises on Private Agricultural Land

Various researchers (Swinerton, Davies and Gilbert) have identified three principal categories of RTR enterprises that are commonly hosted on agricultural land: tourist accommodation; resource-based activities; and day-visitor activities.³⁷ These categories are not mutually exclusive and frequently overlap with more than one type of RTR hosted on the same site. Figure 3.1 graphically illustrates this concept.

³⁷ Swinerton, G., (1982). Recreation on Agricultural Land in Alberta. Published by Environment Council of Alberta, p. 151.

Figure 3.1

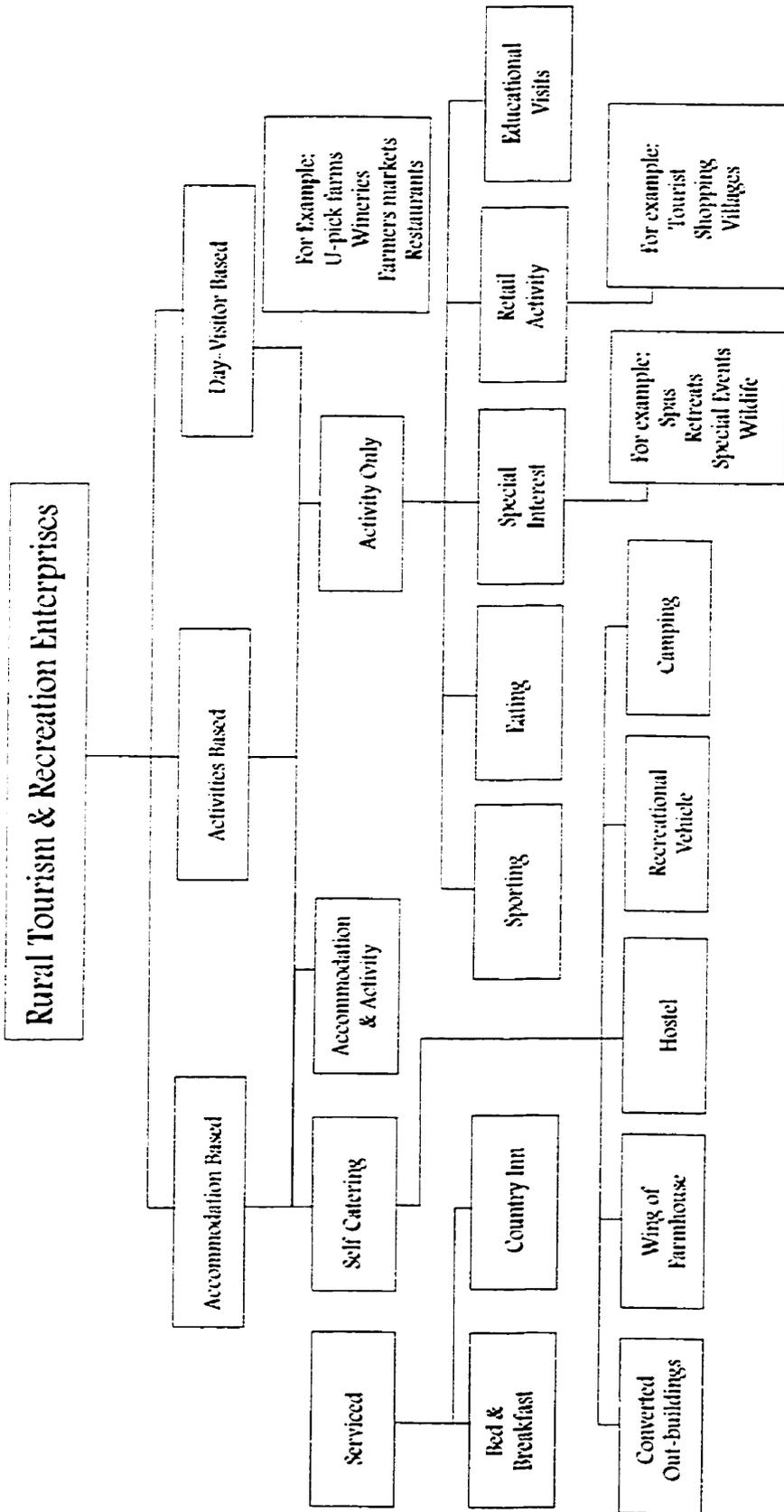


Figure 3.1: Main Classifications of Rural Tourism & Recreation (RTR) Enterprises
Adapted and expanded from Davis and Gilbert (1992)

Tourist accommodation enterprises host overnight visitors and include bed and breakfasts, country inns, camping, cabins, and hostels. Given a broad definition, residential RTR enterprises may also include residential camps directed at specific market groups, such as summer children's camps or an artist's retreat. Resource-based RTR includes activities such as riding and pony trekking, fishing, water sports, and hunting.³⁸ Day-visitor enterprises include u-pick produce farms, educational visits, restaurants, and picnic areas.

Several researchers (Swinerton, Ironside, Davis and Gilbert) have made a clear distinction between RTR enterprises that supply accommodation and those that do not. Those that do not provide accommodation and are activity based require a much greater capital investment for the development of specialized recreational facilities. Moreover, "in most cases, particularly of stables and shooting preserves, farming becomes an adjunct operation to the recreational enterprise."³⁹ It is feasible that some accommodation operations may also generate great enough revenues that the farm becomes the secondary source of income. Campgrounds, country inns, and residential camps in particular may be successful enough to become the primary business. RTR enterprises have great potential to supplement landowner income in marginal agricultural areas as many of these areas are frequently situated in an attractive landscape that is in proximity to natural areas and parks.⁴⁰ "Indeed, the attractiveness of the

³⁸ Ibid.

³⁹ Ironside, R.G. (1971), "Agricultural and Recreational Land use in Canada: Potential for Conflict or Benefit?" Canadian Journal of Agricultural Economics vol. 19 (2) p. 4.

⁴⁰ Swinerton, G., (1982). Recreation on Agricultural Land in Alberta, Environment Council of Alberta, p. 148.

landscape and its suitability for these [RTR] enterprises is often inversely related to the agricultural productivity of the land."⁴¹

3.2 Motivations for Landowners to Host RTR

A recent study in British Columbia found that there were three principal reasons for farms to become involved in a tourism activity. The primary motivation of farmers who started a tourism-based business was to increase farm income; second, was to create more farm employment for the family; and third, to educate people about farms.⁴²

In contrast, Getz and Carlsen, found in their Western Australian study of family businesses in rural tourism, "that lifestyle preferences [are] seemingly more important than profitability or growth of the business."⁴³ The study found that the most important goal of operators was "living in the right environment and enjoying a good lifestyle."⁴⁴ Getz and Carlsen found that operators gained satisfaction by working as a family; pride in the business; and independence or making one's own decisions. The difficulties that operators had in this study include interference with family life and leisure; finding a balance between work and leisure; and internal family conflicts.

⁴¹ Ironside, R.G. (1971), "Agricultural and Recreational Land use in Canada: Potential for Conflict or Benefit?" Canadian Journal of Agricultural Economics vol. 19 (2) p. 9.

⁴² Williams, Peter. (1997) "Opportunity analysis for farm-based businesses: final report," prepared by Strategic Partnerships in association with Peter Williams and funding assistance from the MC Ministry of Agriculture, Fisheries & Food. p. 14.

⁴³ Getz, D. and Carlsen, J. *Goals of Family Businesses in the Rural tourism and Hospitality Sectors*, unpublished at time of writing.

⁴⁴ Ibid.

Another interesting finding of this study is that “in many of these businesses the family (mostly a couple) works closely together until business and family life tend to merge.”⁴⁵ The author notes that this blending of work and family is not likely uncommon to traditional operating farms; however, a tourism enterprise on the farm introduces foreigners whose influences create a new family dynamic.

From these studies it seems that families initially become involved in operating a RTR enterprise either as a lifestyle choice or to supplement farm income. The variance between the two studies is likely because the study in British Columbia focused on agri-tourism specifically rather than rural tourism in general.

3.3 Barriers to RTR Enterprises on Private Agricultural Land

While financial gain or lifestyle seems to be the primary reason for landowners to host RTR enterprises, there is a substantial list of disincentives. These include factors that either discourage or inhibit the development of RTR enterprises. The following is a listing of these factors, which has been derived from several sources (Jenkins and Prin; White and Dunn; Ironside; Voth and Wright, Glyptis; Swinnerton; Hackett, Page and Getz; and Weaver and Fennell).

Economic Barriers

RTR enterprises require capital investment for the development and maintenance of facilities. While some operators may be able to take advantage of spare rooms to develop a Bed and Breakfast, the majority of RTR enterprises

⁴⁵ Ibid.

require the entrepreneur to invest capital to construct and maintain required facilities. Non-residential and sport specific developments in particular have high investment costs. Additionally, providing access to farmland for recreational purposes may cause crop damage or stress on livestock that result in lost farm revenues.

Environmental Barriers

Access to the farmland may result in negative environmental impacts. Erosion caused by over-use of pathways and trails may cause permanent root damage to the native plant species and becomes particularly problematic on hills, steep slopes, and near water courses.

Damage to vegetation cover may also be caused by the introduction of non-native plants and weeds that reduce the ability of the land to grow crops or provide pasture. For example, the garden flower scabiosis, which is not native to North America, has become a weed that can overtake entire fields and must be controlled using herbicides. Seeds attached to clothing or footwear may be introduced into rural areas by tourists or recreationalists. Similarly, foreign plant diseases or insects may accidentally be introduced. This becomes of particular concern for RTR enterprises that may consider hosting international tourists.

Social Barriers

Recreationalists and tourists may inadvertently cause property damage through inappropriate behaviour. Careless use of firearms, harassment of livestock (particularly if the recreationalists have dogs), gates left open, and litter have the potential to create significant damage to landowner property. Moreover, careless handling of fire and disposal of cigarette butts have the potential to cause fires that result in irrecoverable damages. Many of these barriers may be mitigated or overcome by educating recreationalists about the dangers that such behaviour may cause.

Recreationalists and tourists also disrupt the privacy of landowners. Many landowners may not be willing to forgo their privacy by allowing RTR activities to take place on their land.

Business Knowledge

Starting and running an RTR enterprise requires that the landowner (and future operator) have a certain level of business knowledge and acumen. Without the necessary management skills, landowners may not know how to prepare a business plan, or know how to access financial resources and markets. Further, business courses offered may not be readily accessible to rural residents that may wish to increase their knowledge in business prior to making a decision to develop an RTR enterprise.

Nature of the Tourism Industry

The tourism industry is volatile as it is greatly affected by the ebb and flow of the economy. This is “because recreation and tourism are activities largely dependent on discretionary income, general economic trends, and peoples expectations about the future direction of the economy.”⁴⁶ With wide fluctuations in market demand, RTR enterprises must be resilient enough to withstand periods of downturn in the economy. This resiliency is particularly important with smaller operations as is typical in rural areas. For example, a Bed and Breakfast with only three or four rooms has a much greater proportion of revenues lost for a vacant room than a large hotel. Furthermore, operating costs are not necessarily reduced since the number of workers may not decrease with lower occupancy rates. For instance, preparing one guest meal requires the same amount of time and effort as preparing four guest meals. Therefore, cost savings with reduced occupancy are minor (if any at all).

Tourism and recreational market demand is also seasonal. This seasonality creates operational difficulties by creating inefficiencies in the use of facilities and managing staffing levels. Facilities developed may only be in use for a limited part of the year and remain vacant during off-seasons.

⁴⁶ Reiling, S.D., and J. Bergstrom (1995), “Macroeconomic trends and their effect on outdoor recreation and tourism,” in *Proceedings of the Fourth International Outdoor Recreation and Tourism Trends symposium and the 1995 National Recreation Resource Planning Conference*, May 14-17, 1995, St. Paul, MN, comp. J.L. Thompson, D.W. Lime, B. Gartner, and W.M. Sames. St. Paul, NM: University of Minnesota, College of Natural Resources and Minnesota Extension Service.

Not only are large RTR enterprises more resilient during times of economic or seasonal downturn, they also are able to take advantage of economies of scale that smaller organizations cannot attain. Economies of scale take place at many levels within the organization. Staffing, facilities, equipment, and operations all have the potential to realize greater efficiencies in larger operations. For example, the purchasing power with suppliers that is held by larger organizations far exceeds that of small enterprises. In particular, enterprises that are seeking a wide target market may have difficulty in marketing, or promoting themselves. A brief discussion regarding the promotion of RTR enterprises is found in Appendix A.

In sum, tourism and recreational enterprises are subject to seasonality and fluctuations in demand that are wider than the economy as a whole. These industry factors contribute to uncertainty making capital investment into RTR enterprises risky and the securing of financing difficult.

Available Infrastructure

Rural environs often lack the infrastructure required for developing RTR enterprises. Depending on the scale of development, issues may include servicing of water, power, sewer, and waste disposal. Additionally, the traffic generated by a RTR development may cause congestion on local roads or require costly upgrades to the transportation network. These factors can become significant barriers to new developments particularly in remote areas.

Legal Concerns

Real or perceived concerns about liability may deter landowners from permitting RTR activities from taking place on their property. Cost of insurance to cover liability may further deter potential operators from becoming involved in an RTR enterprise. Insurance costs may be especially a deterrent for RTR activities that have a component of danger. Activities that involve a risk factor are particularly susceptible to this barrier. Activities such as horseback riding and water sports, for example, have a certain amount of danger associated with them. While proper equipment (i.e. hard hats and boots for riding, life jackets for water sports) may reduce the risk of harm to participants, there is still an element of risk and liability insurance should be secured.

Public Policy Preparedness

As noted previously in Chapter 1, discussions regarding the public sector are examined from the perspective of the private developer. Naturally, these discussions provide background information that may be helpful to authorities in providing them with an awareness of the issues that surround private RTR enterprises.

Local municipalities may be slow to accept or encourage RTR enterprises as they might not be familiar with the issues that surround such ventures. Additionally, they may have few policies in place that guide the development of

RTR and land use regulations might not include RTR activities. While the Land Use Bylaw (LUB) serves to control development and facilitate change in land use, it does not necessarily provide policy guidance on criteria that should be considered when assessing applications.

With few guidelines in place, authorities may be slow to process applications or require rigorous and detailed applications to insure the suitability of the development. This is particularly true for larger scale operations where authorities may request detailed reports such as stormwater management plans, traffic impact assessments, environmental impact assessments, and aquifer testing to gain assurance that the development is suitable for the area in which it is proposed. Through the development of policy plans, municipalities can take a proactive approach that anticipates development pressures and outlines criteria that should or shall be considered in making planning decisions.

Working with public authorities is often cited as a barrier to RTR development by private developers and landowners. In fact, in a study of Saskatchewan RTR enterprises (Weaver and Fennell, 1997), landowners expressed much frustration in working with government agencies. The most common complaint was that regulations were unnecessary, expensive, complex and contradictory. As a result, authorities may be a barrier to RTR development depending on the policies and plans of the specific municipality. However, it is also important to recognize that many landowners are not familiar with the planning and

development process and, therefore, some of the frustrations expressed may be a result of misunderstanding the processes involved.

3.4 Alberta Policy Context

The capability to create policy guidelines for RTR development exists within current municipal and provincial legislation. Through the provisions of the Municipal Government Act (MGA)⁴⁷, municipalities have been given delegated local authority and are required to develop their own Municipal Development Plan (MDP). The intent of the MDP is to guide the future development within the municipality. Recreational development is one type of future development and thus municipalities have the authority to develop their own strategy for tourism and recreational development. While municipalities are required by the MGA to establish recreational policies that facilitate and guide recreational development of Municipal Reserve lands, there is no specific requirement to address tourism or recreation in general.

In Alberta, there are no longer any regional planning commissions. Pursuant to the MGA⁴⁸, municipalities *may* enter into a joint Intermunicipal Development Plan (IDP) to address future land use and any other physical, social or economic development of the area that the councils consider necessary. Tourism and recreation may be included in an IDP, at Council's discretion. A fully integrated Plan would facilitate regional initiatives. Regional trail networks, for example,

⁴⁷ Municipal Government Act, Copyright of Alberta Statutes and Regulations, Sections 631, 632

⁴⁸ *Ibid.*

clearly are more effectively developed through an integrated plan across municipal borders.

The Alberta Government also has the authority to create policies with respect to public lands, but no guidelines exist that address tourism and recreational development on private lands. An analysis of the relevant Acts, Policies and Plans that guide development on public lands is beyond the scope of this study, but it is a source of much controversy and debate among Albertans. Currently, Alberta's publicly owned land is managed under the *Provincial Parks Act*, the *Wilderness Areas, Ecological Reserves and Natural Areas Act*, and the *Willmore Wilderness Park Act*. The province is undergoing a reclassification system of protected areas to consolidate these acts into the *Natural Heritage Act*. This new act will also include public lands that are currently under lease for agricultural purposes. Additionally, the Province has established the "Alberta Tourism Recreational Leasing Process," (ATRL) which provides procedural guidelines (and some limited policy guidelines), used in the review of tourism and recreation proposals on public lands.

3.5 Planning considerations for RTR enterprise development

The literature raises numerous issues surrounding RTR enterprises. The majority of these issues may be grouped into eight categories: (1) Access; (2) Competition for Rural Resources; (3) Attractions, Amenities, and Activities; (4) Social Interaction; (5) Physical Environment; (6) Business Skill and Knowledge;

(7) Finance and Economics and (8) Public Policies. Each of these topics are significant in themselves and require thorough investigation that is beyond the scope of this project. Nevertheless they are important considerations for entrepreneurs who are considering RTR developments and are discussed in greater detail in the Alborak Stable case study. Each of these issues is now reviewed:

3.5.1 Access

Access relates to the modes and difficulty of transportation both to and within a destination. It is a dynamic and complex issue for RTR. Some activities are "subject to distance-decay functions and must be nearby to attract frequent use, while others attract travellers because of remoteness."⁴⁹ Consequently, the potential for different types of RTR developments relates directly to its spatial relationship to population centres. For example, developments that do not provide accommodation and are primarily day-use enterprises, such as shooting preserves and riding stables, should be located within easy commuting distance of major urban centres.

⁴⁹ Page, S. and Getz, D., (1997). The Business of Rural Tourism: International Perspectives. International Thomson Business Press, London. p.20.

3.5.2 Competition for Rural Resources

Introducing tourism and recreation to rural areas creates a new competitor for rural land-use. Other resource-related activities may be complementary to, neutral, or in conflict with RTR activities. At one end of the continuum, the activity enhances the RTR experience while on the other, competition for the resource results in an incompatibility that prohibits both activities from occurring "in the same area at the same time using the same resources."⁵⁰ Some rural industries disrupt the natural environment and landscape, which may decrease the rural aesthetic and ambience, that the rural tourist or recreationalist is seeking. Forestry, intensive livestock operations and oil and gas extraction do not fit within the tourists' or recreationalists' idyllic image of the countryside (whether it is realistic or not).

RTR activities themselves have impacts that may disrupt the traditional industries that exist in rural environments. These impacts constitute some of the greatest barriers to RTR development on private land. As noted earlier, some of these impacts include damage to the environment, disturbance of livestock and wildlife, and social impacts.

In addition to land, RTR enterprises also compete for rural labour resources. During certain times of the year, this may become a particular problem for RTR operators. Working farms may have difficulty meeting the demands of

⁵⁰ Boyd, S.W. and Butler, R.W. (1996). "Managing ecotourism: an ecotourism opportunity spectrum approach," Tourism Management, vol. 17, No. 8, p. 561.

recreationalists and tourists during peak operational periods such as calving season and harvest. RTR enterprises may choose to close during these peak periods or incorporate farm work as a part tourist activity. Further difficulties arise with the seasonality of RTR demand particularly if peak demand periods coincide with peak farm activity periods.

3.5.3 Attractions, amenities and or activities

Attractions relate to the setting and its suitability for various activities. It is important to note that attractions do not necessarily have to be located on site. Proximity to off-site attractions may be just as or even more critical to the success of an RTR enterprise. Landowners who are in close proximity to parks, recreational areas, Farmer's Markets, and Tourist Shopping Villages* may operate ventures such as a Bed and Breakfast or Tea House, with few other on-site attractions. In Oppermann's study of farm holidays in Germany, he found that on average, guests averaged between five and six excursions per visit.⁵¹

A list of all the potential attractions of an area does not necessarily suggest that all these attractions are compatible. That is, one or more activities may be an attraction at the detriment of the other. For example, hunting wild game may be an attraction for a specific RTR enterprise; however, it severely limits the area for other activities.

* Tourist Shopping Villages (TSV), are defined by Getz (1994) as "small communities which base their tourist appeal on retailing, often in pleasant settings marked by historical or natural amenities."

3.5.4 Social Interaction

“Not every farmer can operate a successful vacation farm because of the need to be personable [and] to like all types of people.”⁵² This is particularly important for families who are considering offering overnight accommodation. Often Bed and Breakfasts, for example, are usually run in the house of the host. Guests are demanding and may create disruptions at any hour limiting the leisure time of the host family.

Earlier discussions relating to the motivations of RTR operators and family run business relate specifically to this topic. Family life, in some instances, becomes indistinguishable from the RTR enterprise. In addition, many of the barriers to RTR development identified relate to inappropriate social behaviour by recreationalists and tourists. Among those listed include litter, harassment of livestock, damage to vegetation, and fire. One means of mitigating some of these problems is through the education of guests.

3.5.5 Physical Environment

Recreational activities impact the physical environment in various ways. Damage to vegetation cover, erosion, wildlife, litter, and other pollutants are all associated with increased recreational and tourism activities. Ironically, visitors effectively damage the very characteristics of the physical environment that drew

⁵¹ Oppermann, Martin. (1995) “Holidays on the farm: A case study of German hosts and guests,” Journal of Travel Research Vol. 34, No.1

them there in the first place. Some activities are more consumptive of the environment than others. Off road vehicles and recreational activities that require purpose built facilities have a particularly strong impact that may affect a large area even if the activity is confined. For example, noise from all terrain vehicles or fertilizers spread on golf courses are difficult to contain.

In some instances, these impacts are permanent. The disruption to the physical environment is such that it is permanently altered and cannot be returned to its previous agricultural use. This may have serious implications if the recreational activity loses market favour and demand for such facilities diminish.

3.5.6 Business Skill and Knowledge

Lack of business skills and knowledge is one of the greatest barriers for landowners. Marketing, hiring employees, training, financing, accounting, and technological capabilities are all important for the success of a RTR operation. Certain expertise and qualifications may be required, especially for some types of specialized recreational pursuits. For example, if canoeing is an activity that is offered, the landowner should be able to give some instruction in this area and have the knowledge to ensure that all the safety precautions are taken.

Gaining the necessary skills through educational courses is not always a viable option. Many landowners do not have the ability to readily access urban centres

⁵² Ironside, R.G. (1971), "Agricultural and Recreational Land use in Canada: Potential for Conflict or Benefit?" Canadian Journal of Agricultural Economics vol. 19 (2) p. 9.

that offer courses in these areas. Commuting distances and time schedules may render courses, typically offered in urban centres, unrealizable. With advances in technology, however, there is increasing potential for distance learning that may overcome these barriers. For example, "Agriculture and Agri-food Canada" have begun to offer online training programs.

3.5.7 Financing

The capital investment required to develop a RTR enterprise will vary substantially on the type and scale of the operation. In many instances, the costs associated with developing facilities and/or renovating existing buildings will discourage landowners and farmers from starting RTR enterprises. Furthermore, "many rural tourism businesses fail to achieve acceptable profitability. This makes it difficult to attract loans and investors, and causes entrepreneurs to invest a great deal of their own land and time."⁵³ Moreover, tourism is an unstable sector and is vulnerable to recession, exchange rates, bad weather, and transportation (fuel) costs.⁵⁴ Seasonal demand creates further operational difficulties in the development of a profitable RTR business. At certain times of the year the operation may be at full capacity while during others, there is not sufficient demand to support the venture. In addition to capital investment, money must be budgeted for insurance, marketing, training and staffing.

⁵³ Page, S. and Getz, D., (1997). The Business of Rural Tourism: International Perspectives. International Thomson Business Press, London. p.196.

⁵⁴ Butler, R. and Clark, G. (1992). "Tourism in Rural Areas: Canada and the United Kingdom," in Bowler, Bryant, and Nellis, Contemporary Rural Systems in Transition Volume 2, Redwood Press, UK., p. 175.

Lack found in her 1997 study of agri-tourism ventures in British Columbia that financially successful operations undertake specific activities; are open for business often and for a greater number of years; are family run; and use specific marketing techniques.⁵⁵ Additionally, the study concluded that geographical location, capital investment, number of activities, and types of activities offered were important in the success of agri-tourism ventures.⁵⁶

3.5.8 Public Policy

As noted earlier, some landowners perceive the public authority as a barrier to RTR. Whether this barrier is real or perceived, it may originate from one of several problems. The authorities may not be familiar with RTR enterprises and be hesitant to support such ventures; the landowner may not be familiar with the planning process and procedures; or the land-use regulations may not support or may restrict RTR development.

For example, Oppermann found that the average number of accommodation units provided to guests on farms in Germany was eight; however, he recognized that this was likely due to the government policies and regulations that limit the number of units permitted.⁵⁷ This demonstrates how institutional policies may constrain RTR development. In Alberta, policies and regulations established at the municipal level have an affect on RTR enterprises. For example, in the Municipal District of Rocky View, Bed and Breakfasts may have up to three (3)

⁵⁵ Lack, K.J. (1997). "Agri-tourism Development in British Columbia," Research Project, Simon Fraser University. p. 77

⁵⁶ Ibid.

guest rooms and are restricted to offering guests breakfast only. In contrast, the Municipal District of Bighorn, only permits two (2) guest bedrooms; however, operators may offer light meals other than breakfast.

A study by Hackett, conducted on wine agri-tourism in Canada, found that institutions were in fact a barrier to development in this sector. The study concluded that:

Essentially all agencies have overlooked the potential of tourism to reshape agricultural production and functioning. Land use by-laws that are in place strive to ensure agricultural land is preserved and that compatibility among neighbouring uses is achieved, but little has been done to address the need for an overall growth management strategy or to look at how changing definitions of agriculture imposed by agri-tourism may render existing by-laws both ineffectual and outdated.⁵⁸

Hackett argues that the omission of agri-tourism in public policies and by-laws fails to recognize the potential that it has to supplement farm incomes and ultimately preserve agricultural land.

How then should authorities develop initiatives that facilitate appropriate RTR development? Curry, a rural recreational planning theorist whose work has been primarily conducted in the United Kingdom, suggests four (4) main guidelines for developing rural leisure (RTR) policy. These include the following:

⁵⁷ Oppermann, Martin. (1995) "Holidays on the farm: A case study of German hosts and guests." Journal of Travel Research Vol. 34, No.1

⁵⁸ Hackett, N.C. (1998). "Vines, Wines, and Visitors: A Case Study of Agricultural Diversification into Winery Tourism." Master Degree Research Project, Simon Fraser University.

1. Policies should be restricted to land-use considerations.
2. Recreation and sport should be contained in areas of low quality environment and where developments do take place, be in tandem with farm diversification.
3. Rural leisure objectives should be subservient to environmental conservation goals.
4. Public rights of way networks should be maintained and enhanced wherever possible.⁵⁹

Curry also notes that policy formulation in the United Kingdom has also lacked integration and co-ordination between government agencies and local authorities; that policy has been restrictive rather than facilitative; and that rural recreation policies have had a low priority.⁶⁰

3.5 Conclusions

There are three principal classifications of RTR enterprises: accommodation based, activity based, and day-use based. Usually RTR businesses focus on one of these categories; however, they are not exclusive and often service users in more than one category.

Families are most often motivated to establish a RTR enterprise to supplement farm incomes or for a lifestyle choice. These motivations outweigh the numerous barriers to RTR development, which include economic, environmental, and social, barriers. Furthermore, the volatile nature of the tourism industry deters all but the most hardy of investors.

⁵⁹ Curry, Nigel. (1994). Countryside Recreation, Access and Land Use Planning, Chapman & Hall, London. pp. 132-133.

Within Alberta, municipalities have been delegated the authority to establish policies for RTR development on private lands. Despite this ability, policies regarding RTR have a low priority and few municipalities have established policies in these areas. Without guidance, RTR will likely develop for short-term gains at the expense of long-term sustainability of the rural society, economy, and environment.

The appropriateness of a RTR enterprise is highly contextual. Social, environmental, economic, and market environments are unique to each site and family considering the development of an RTR enterprise. Grouping planning issues into the categories of access; competition for rural resources; attractions, amenities, and activities; social interaction; physical environment; business skill and knowledge; financing; and public policy, provides a pragmatic means to identify issues that surround the development potential of a specific site. In assessing these planning issues, opportunities for a specific family and location for a potential RTR development may be determined.

⁶⁰ Ibid. p.208.

CHAPTER FOUR: RTR: THE CASE OF ALBORAK STABLE

Alborak Stable is a family-run equestrian facility located 35 km west of Calgary just south of the TransCanada Highway, 15 km north of the Kananaskis Country Provincial Park's Sibbald Flats entrance. It is a diverse equestrian business with activities including horse management, training, lessons, clinics, and commission sale horses (horses that are brought to the Stable to be sold). Within the equestrian field, the Stable specializes in the Olympic disciplines, which include Combined Eventing, Show Jumping, and Dressage. The Stable is situated on portions of Juniper Ridge Ranch: the family farm. The author is a member of the host family and therefore this case study is conducted from the perspective of the private sector. Discussions regarding the public sector relate to its relationship with the private sector they are intended to provide background information to public authorities that would assist them in preparing policies and plans.

This chapter documents the planning process that the family went through in the development of Alborak Stable. Motives, barriers and planning issues will be discussed. The purpose of this analysis is to give the reader insight to the principal factors that led to the development of the facility; to determine how it was able to address barriers to development; and identify the factors that were key in its success. The chapter begins by discussing the context of the Case

Study. The physical context of the site will be discussed as well as the working ranch prior to the development of the RTR facility.

4.1 Context

Alborak Stable is located on a portion of the family farm, which is named 'Juniper Ridge Ranch'. The farm encompasses approximately 800 acres and has been operated by the family on a part time basis for the past 11 years. The extended family has been involved in agriculture in Alberta since 1886. The lands that compose Juniper Ridge Ranch, have been in the extended family since the 1940s. At that time, there were no roads to the area and the land was used as summer range for cattle. With the discovery of natural gas in the area in the 1970s, roads were constructed to facilitate the recovery of this valuable resource.

The immediate family members include Mary and John (parents) and two daughters, Sandra and Karen. The Juniper Ridge Ranch lands were inherited by Mary in 1980. The ranch house was built in 1981, and the family began cattle ranching on a part time basis in 1989. Horses have always been an interest to family members and a focus of family activities.

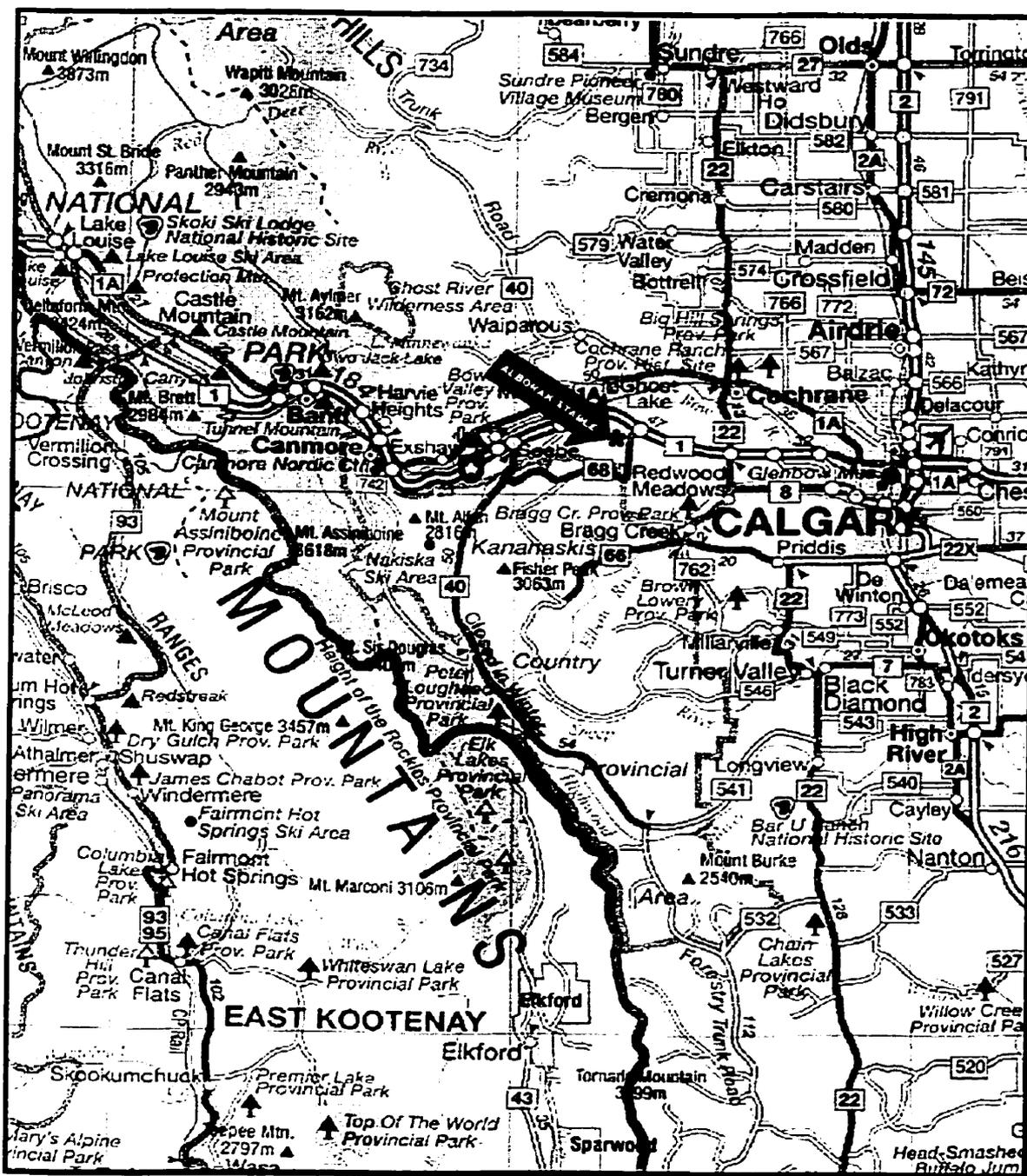
Juniper Ridge Ranch has raised cattle on the land and continues to run 50 cow-calf pairs. Dense trees, rocky soils and varied terrain make the use of this land for this purpose very limited. The current land holdings are not capable of supporting a cattle-farming operation, sufficient in size, to support a family. High

land values in the area make expanding the existing operation by purchasing additional adjacent lands unfeasible.

Although the Juniper Ridge Ranch lands are marginal for farming, there are numerous features that make it attractive to recreationalists. Rocky ridges, wildlife, watercourses, varied vegetation and stunning mountain views create a desirable setting for a wide variety of recreational activities.

At this time there has been relatively little tourism or recreational development in the vicinity. However, there has been some land that has been designated for tourist commercial and country residential use in the vicinity of Scott Lake, located 2 miles north of Alborak Stable. There is also an active application in the neighbouring Municipality (M.D. of Rocky View) for a Golf Course, Trail Riding, and Campground development 3 miles east of the Stable. These areas are identified on the Location Map, Figure 4.1.

Regionally, the Juniper Ridge Ranch lands are located in the foothills, north and east of important tourism and recreational areas. These include Kananaskis Country, Bow Valley Provincial Park, and Banff National Park. Additionally, to the west is the Stoney Indian Reserve. Thus, the majority of lands to the south and west of the Ranch are not in private ownership.



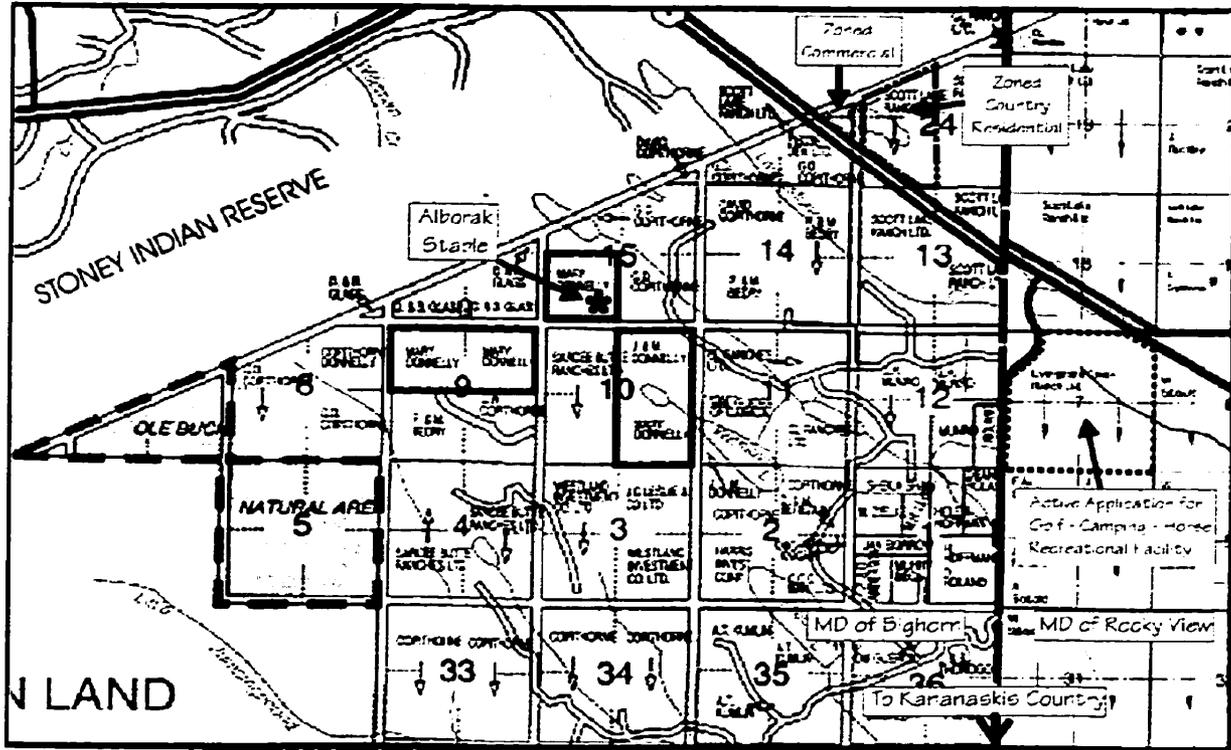
LOCATION MAP

SCALE: 1:1 250 000



FIGURE 4.1

Figure 4.1

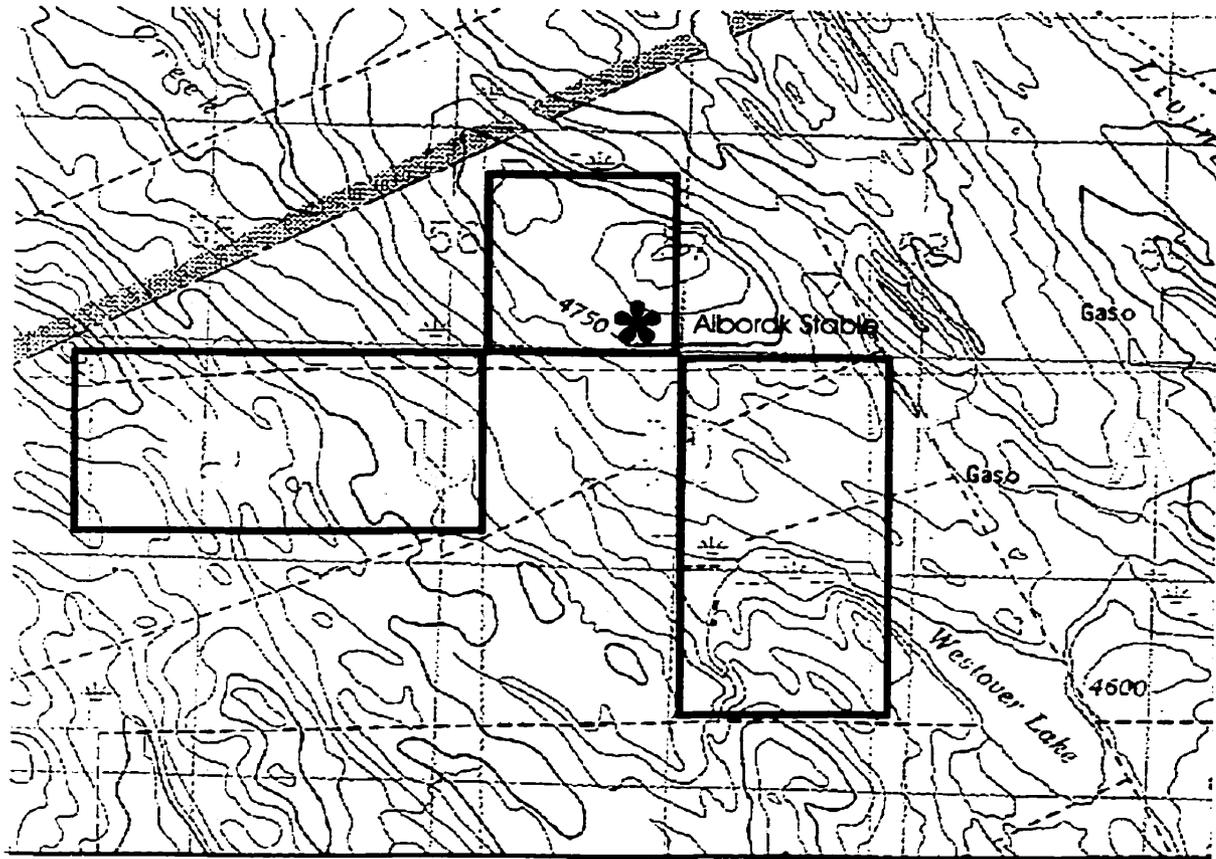


REGIONAL CONTEXT MAP
SCALE: 1:80 000



FIGURE 4.2

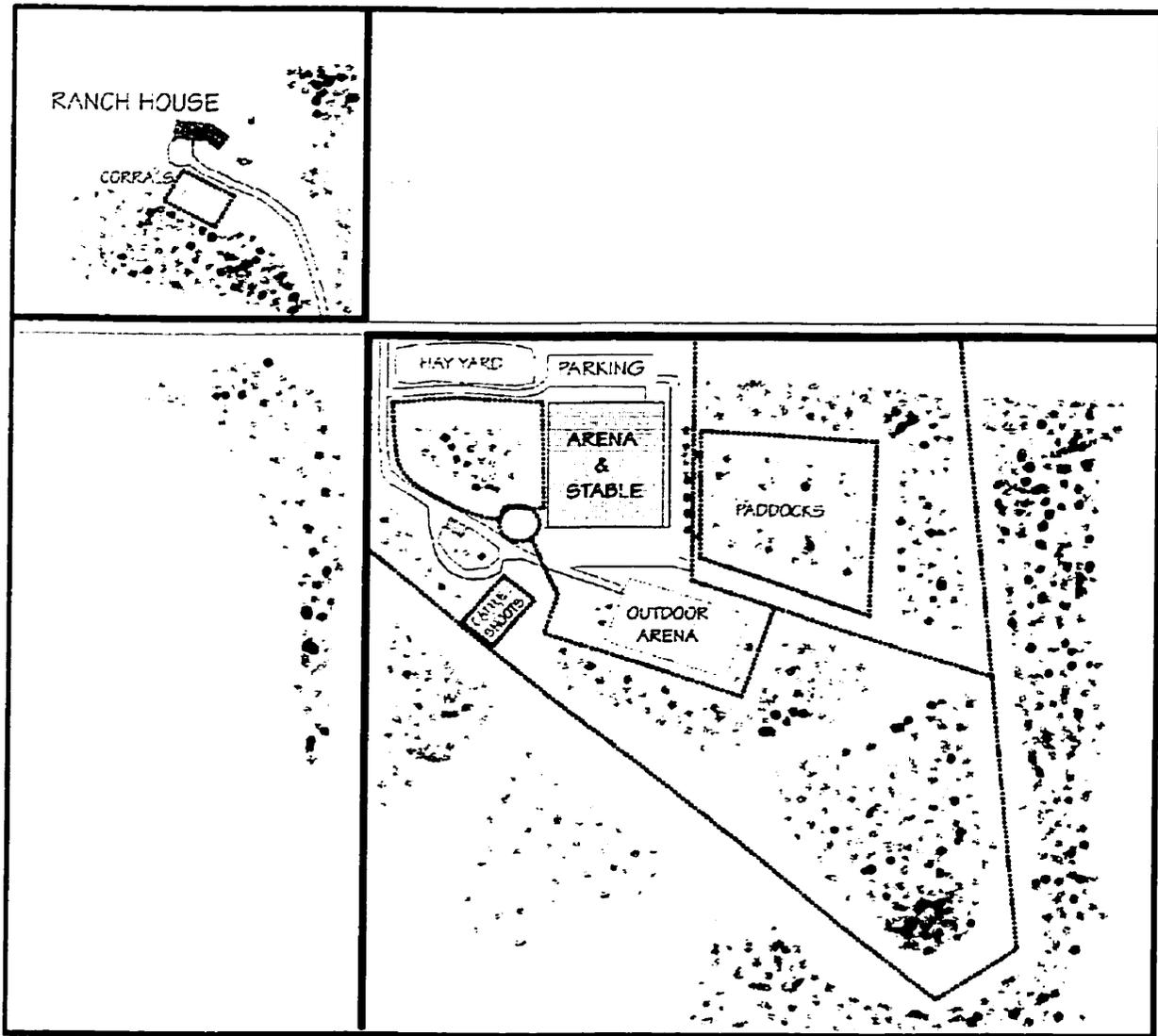
Figure 4.2



TOPOGRAPHY
SCALE: 1:32 000
10m Interval
N

FIGURE 4.3

Figure 4.3



ALBORAK STABLE SITE PLAN
SCALE: 1:150



FIGURE 4.4

Figure 4.4

Two opposing forces, both with gaining strength, are creating increasing friction on development in the Canmore, Banff, Kananaskis, and Bow Corridor areas. Tourism and recreation in these areas have built a wave of demand that carries a strong momentum. Conversely, increased awareness and concern over the environment has brought much criticism of development in these sensitive areas. Given these forces, it is the author's opinion that tourism and recreation in the vicinity of Juniper Ridge Ranch is imminent.

4.2 Decision to Develop the RTR Facility

The building of the equestrian facility has been the first step in the realization of a long-term dream. Sharing in a passion for horses and equestrian sport, the family has shared in a vision of developing an equestrian training facility. Essentially, the development has been a lifestyle and interest choice, however, the family recognizes that long-term profitability of the business is essential.

Knowledge gained from over 20 years of experience with horses has enabled the family to understand many of the intricacies of the industry. A broad knowledge base in areas of nutrition, conditioning, first aid, saddlery and numerous other horse-related topics are essential to running an equestrian business. Collectively, family members hold this knowledge.

Little or no marketing research was conducted prior to the development of the facility. An "if you build it, they will come" philosophy was employed. The family

entered into the venture with full knowledge of the significant risks that they were taking. Although, no formal research was conducted, many trends would suggest that the placement of the facility on Juniper Ridge Ranch would not be successful. The vast majority of riding facilities are located much closer to urban centres. It seemed doubtful that potential clients would be willing to commute the extra distance to Juniper Ridge Ranch. Sentimentally attached to the land, the family never considered building a facility elsewhere.

4.2.1 Horse Industry Context

As this case study relates specifically to equestrian recreational sport, a brief description of the industry is provided to give the reader a greater understanding of the context of Alborak Stable. The horse industry is complex. Certain aspects of the industry may be viewed as strictly agricultural and others purely recreational. In Alberta, horses are raised for recreation and sport, gaming (racing), ranch work, mounted police and park wardens, food production, and estrogen production (for producing birth control pills). The most recent statistics regarding Alberta's horse population is from 1985. At that time, there were 150,000 horses in the province.

The recreational and sport horse industry can be divided into several sectors. These include Endurance Riding; Polo; Fox Hunting; Speciality Breeds; Driving; Polo-Cross; Western Disciplines (e.g. roping, barrel racing, rodeo); and English Disciplines (Dressage, Eventing, and Show Jumping). There are numerous clubs and associations throughout Canada and Alberta for people who are

involved in horse sports and recreation. Perhaps the largest recreational and sport horse organization in Alberta is the Alberta Equestrian Federation, which has over 6,000 members.

Alborak Stable focuses on the English equestrian sport and recreation, which includes all three of the Olympic disciplines of Dressage, Eventing (Horse Trials), and Show Jumping. A complete facility used to host these disciplines would include indoor and outdoor training areas for dressage and show jumping; a cross-country obstacle course; bridle trails; barns; turnout paddocks; pasture; competition rings and warm-up areas.

There are numerous equestrian facilities in Alberta that provide some of these facilities; however, at the time of writing, there were none that provided a complete facility.

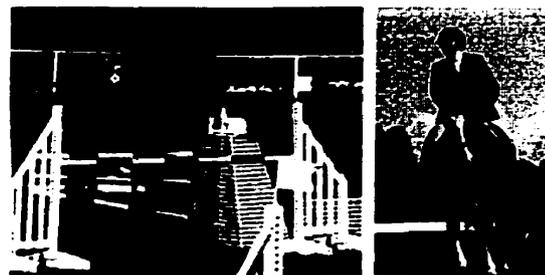


Figure: 4.5 Equestrian Disciplines: Jumping, Dressage, & Eventing

Within the Calgary vicinity, the most well known equestrian facility is Spruce Meadows. Spruce Meadows is the most complete equestrian facility in the area; however, it does not have cross-country course nor bridle trails which are required for eventing (horse trials). There are roughly 12-15 other facilities in the Calgary area that cater specifically to the English riding disciplines.

With high capital development costs, investors considering development of an equestrian facility must have solid business plans. In the case of Alborak Stable, financial statements, budgets, and business plans are not available for analysis. Alberta Agriculture, however, has prepared pro-formas for investors who may be considering developing an equestrian facility. For the interest of the reader, these pro-forma statements have been included in Appendix B.

4.2.2 Development of Alborak Stable

Through their involvement with the horse industry, the host-family members have been in, on, and about numerous equestrian facilities. Many of these facilities have been an example of what not to build rather than what to build. Many facilities are poorly lit, in poor repair, have terrible ventilation and heating, and seemingly have had little thought put into their design.

Knowing that potential customers would have to commute further to a facility on Juniper Ridge Ranch than to other facilities, the family decided that they would have to offer a better facility and provide better service than competitors. With this philosophy, the family took an all or nothing approach and decided to build a top facility offering a wide variety of horse related services.

Given the Alberta climate, it is necessary to develop both indoor and outdoor riding areas to enable year-round training and comfort. Thus far, the family has built an indoor riding hall (at 20,000 square feet, the riding hall is much larger than what many facilities offer); an outdoor sand ring; a round pen; paddocks; pastures; and a 38 stall barn. The facility has numerous amenities for riders and their mounts. There is a rider's lounge, viewing gallery, two tack rooms, and washroom and shower facilities. As well, there are offices and a kitchen area for staff use. Most riding stables do not provide these amenities nor do they heat the stable and arena during the winter months.



Figure 4.6 Main Stable and Arena Complex; Arial View of Facility

These items were considered critical elements: each an absolute necessity. There are many visions for future additions and development to further enhance the facility for equestrian training and sport. Budget constraints have limited the development to essential elements at this time. It is hoped by the family that the business will prosper and that elements may be incrementally added over the coming years. These elements include the development of a cross-country

course; additional paddocks; hay storage shed; shavings storage shed; shelters; and additional pastures.

In designing the facility, key objectives included safety, efficiency, and presentation. Safety elements include such things as proper flooring, fire precautions, ventilation, and design elements. Efficiencies in the design include natural lighting, building configuration, and materials. The site design also had to accommodate large trucks for the delivery of feed and bedding. Stormwater management factors were also considered and developed to ensure proper drainage of the site. Presentation refers to the general attractiveness of the facility and in particular includes the use of lighting, provision of amenities, and the use quality stable fixtures (such as stalls).

Horses were first stabled in the building in November 1997 and with the completion of the main facility in the Spring of 1998, Alborak Stable was officially open for business. One year later, the facility is operating ahead of business plan projections.

4.2.3 The Business

As diversification strategy, the family decided to create a facility that would support three different target markets. Each target market is supported by its own distinct operational unit. These units include (1) horse breeding, training

and sales; (2) horse and rider coaching for recreation and sport; and (3) horse management. These three units are now discussed.

The primary focus of the horse training and sales operational unit is to train young horses to be sold to prospective buyers. Horses are trained in the equestrian disciplines of show jumping, eventing, and dressage. This unit focuses on developing horses for sale to horse sport recreationalists. It also includes a small horse breeding operation that is geared to producing prospective future athletes. The primary target market of these young horses is to recreationalists who are interested in purchasing a horse for involvement in competitive amateur sport. Sales maybe negotiated directly with prospective buyers or through a horse auction. Geographically, the target market is unbounded. The strong American dollar and the cost savings that Americans are able to achieve through market exchange makes this geographic market particularly promising. To date, Alborak Stable has sold horses to customers as far away as Ontario, California, and Indiana.



Figure 4.7 Mare and Foal

Horse and rider coaching, the second operational unit, also focuses on amateur riders (ranging from children to adults) who are interested in recreational and competitive riding. Lessons are offered daily and are taught by one of the two full

time trainers. In addition to regularly scheduled activities, clinics are also offered to customers whereby experts are invited to come and teach at the Stable. Thus far, clinicians have come from California, British Columbia, and Edmonton to provide instruction to participants. Other activities associated with this business unit are coaching at competitions and conducting lectures regarding horse care.



Figure 4.8 Indoor and Outdoor Arenas

Horse management, the third business unit, relates to the day to day operations of the Stable and general horse care. This includes cleaning, feeding, and maintenance of the facility. Veterinary, farrier (blacksmith), and grooming services are also managed and offered.

Currently, two family members work for the Stable full-time and two part-time. All members work the Cattle operation on a part-time or occasional basis. This is partly a family diversification strategy and partly a means of supporting the start-up phases of the business. Additionally, there are two full time employees, one full time working student, and between two and four part-time working students (varies seasonally). Working students are similar to apprentices in other work environments; they work under a professional to learn the trade and business: in

this case, they learn how to train horses under the guidance of the two full time trainers.

Daily operations require two staff to complete barn chores, which include feeding, cleaning, and general care of the horses. The two trainers work six-day weeks and generally each have six or seven horses in training at one time. In addition, trainers teach lessons, market horses to prospective buyers, and oversee the general operation of the facility. The accounting and ordering of supplies (such as hay, shavings, equipment), requires 4 hours of work per week.

The business operates as a partnership in terms of investment; however, two family members manage day to day operations. While many decisions are made through informal meetings, more formal 'Alborak' business meetings are scheduled. These meetings are generally focused on finance, marketing, and planning and development of the facility. Goals and objectives are set and measured. Goals placed for the first year of operation were far exceeded, and at some points, the family was scrambling to hire skilled staff, build fences, and manage the growth of the business in general. While the business has experienced some growing pains, it is continuing to grow and prosper. As with numerous tourism and recreation enterprises, one of the greatest challenges of the business is securing and maintaining a good work force. It has been particularly important to find staff who is able to internalize the goals and aspirations of the family. Family members take a lot of pride in the business and

are committed to its success. Hence, it is very important to them to have staff who share these values as they play an integral part of the business.

4.2.4 Family Life

Family life has merged with the business life. It is impossible to separate the two as each has a strong influence on the other. It is not necessarily a positive or negative situation; it is just the way the family functions. In many ways, the family business has drawn the family much closer together.

Of principal importance is that the family shares common goals and aspirations for the business and all members take a lot of pride in their work. Although debates do arise, they are generally healthy and thus far, consensus has been reached on all major decisions. Family members realize that they are in the venture together and that it is in everyone's vested interest to seek the best solutions to problems as they arise. Each member has his or her own strengths and perspective. Other members recognize these special skills and listen to their opinions and advice.

The family structure has also changed somewhat. Sarah, a full time employee from the very start of the business, has been 'adopted' into the family and participates in family discussions for the development of the business. Most important family events include horse auctions, competitions and the breeding season.

4.3 Planning Issues

4.3.1 Access

Alborak Stable is located in proximity to some key tourism and recreation transportation corridors. The TransCanada Highway, as shown in Figure 4.1, is northwest of the site. This highway is the main route to Banff National Park, an internationally renowned tourist destination. It is also in close proximity to Sibbald Creek Trail (Highway #68) that leads south from the TransCanada Highway to Kananaskis Country, a provincial wilderness park. Calgary International Airport is less than an hour away and the Springbank Airport is 20 minutes away.

Despite its proximity to these major corridors, the site is located 5 km down a private road. Development might be greatly limited by the use of this road. Currently, the Stable has access by an easement to cross the lands and use the road. Any further development on the site would require negotiation and agreement among all the interested parties.

The lack of a public road has reduced the amount of human activity in the area. This lack of activity has contributed to the character and natural setting in which the site is located. Ironically, the lack of access has preserved the area and made it desirable for RTR; however, without access, there is little opportunity for additional RTR to take place.

Local authorities are unlikely to permit any further development on the site until such time as a public road is developed to provide access. This would require that a road be constructed on the public road allowance or for the land onto which the existing road exists to be properly dedicated to the municipality as a road. Additionally, the municipality would likely require that the road be upgraded to a public standard. The development of such a road, given the difficult topographic terrain, would be cost prohibitive. Authorities are unlikely to permit additional development without a proper road. This is primarily because if the lease on the road ever fails and there is no road access to the lands, the municipality might be considered liable for any losses incurred, based on the premise that they should not have permitted the development to proceed without ensuring proper access.

Proximity to markets is also an important factor. The operators recognized that the location of the business was further than most similar facilities. The Stable is located approximately 30 minutes from the Calgary City limits where the majority of the business customers reside. There are also people who live within a shorter commuting distance from the country residential communities of Bearspaw and Springbank, located immediately west of the City limits. Unexpectedly, the Stable also draws customers from the towns of Cochrane, Canmore and Banff.

Key Access / Marketing Issues

Strengths	Weaknesses
<ul style="list-style-type: none"> • Very good proximity to major tourism highway transportation networks (TransCanada and Sibbald Creek Trail Highways). • Good proximity to international airport. • Site located in an isolated area with little through traffic. • Commuting distance of an hour or less to Calgary, Cochrane, Banff, Canmore, Bragg Creek and Kananaskis Country. 	<ul style="list-style-type: none"> • Private road is a lower standard road that will not accommodate significant increases in traffic unless it is upgraded. • The road allowances that lead to the site would be extremely costly to develop as roads because of topographical constraints. • Located further than many of competitors.
Opportunities	Constraints
<ul style="list-style-type: none"> • The site has the potential to access the major regional RTR transportation network. • Access to 800 acres of land, with numerous existing trails. 	<ul style="list-style-type: none"> • The local road infrastructure would be extremely costly to upgrade. • The development of a public road would likely increase general access to the area and decrease its exclusivity. • Authorities are unlikely to support further development without a public road providing access to the site.

TABLE: 4.3.1

4.3.2 Competition for Rural Resources

Within the immediate vicinity of Alborak Stable are a variety of industries that compete for the same area. These activities include natural gas extraction, forestry, and cattle ranching. They affect any RTR development on the site on two levels. First, aesthetically activities may decrease the attractiveness of the area. Second, due to increasing sensitivity to the environment, some of these

activities have undergone much criticism. Additionally, these activities may conflict with one another. Although there has not been much conflict in the vicinity to date, the extraction of natural gas in proximity to cattle breeding operations and farmsteads has been controversial in parts of Alberta.

Natural Gas Recovery

Shell Canada operates numerous natural gas wells in the area. There is some sour gas associated with the extraction of natural gas and although development is not prohibited in the area,



Figure 4.9 Natural Gas Well

appropriate setback distances from well-sites and pipelines are necessary precautions. Resource extraction of this type may be considered negatively by many RTR participants; however, since the well-sites and pipelines existed in the area prior to the development of Alborak Stable, few conflicts between these two uses have arisen. If there is an increase in activity in the area, particularly if it is in close proximity to the existing facility, there is potential for conflict in the future.

The Alberta Energy and Utility Board (AEUB) regulates any proposals for additional development in the area with little or no municipal involvement. Mineral rights within the vicinity of Alborak Stable are freely held and therefore there is the potential for more activity to take place in the area. The AEUB also

determines appropriate setback distances from sour gas wells and pipelines. The Municipal Government Act (MGA) makes it clear that AEUB authorizations, licences, permits and approvals prevail over any policies, statutory plans, land use bylaws and appeal boards of local municipalities.

Forestry

Logging has been active in the area for numerous years and particularly over the last five years. This industry competes with RTR on two levels. First is on a visual aesthetic value, and



Figure 4.10 Active Logging Site Near Alborak Site

second, the environmental impact drives away wildlife. As both setting and wildlife are important to RTR, there is much potential for conflict between RTR and Forestry. As with the natural gas extraction in the area, most of the logging was completed prior to the development of Alborak Stable. Similarly, although past activities are not at issue, there is the potential for conflict in the future.

The MD of Bighorn has some restrictive policies on the harvesting of timber. Forestry activity is restrictive in some areas of the MD, however, is unrestricted in others. The site of Alborak Stable is within the unrestricted area. Generally, the

MD has policies that encourage selective harvesting techniques for the logging of private land.⁶¹

Agriculture

Cattle ranching is the other predominant land use in the area. The grazing of cattle may be an attraction to some tourists; however, the presence of cattle changes the native eco-



Figure 4.11 Cattle ranching remains the dominant land-use in the area

system's flora and fauna, which may be viewed negatively by visitors. RTR enterprises, such as Alborak Stable, also compete for rural labour resources. Securing qualified labour is and is anticipated to continue to be one of the greatest challenges that the Stable faces.

⁶¹ Municipal District of Bighorn, Municipal Development Plan, p. 38.

Wildlife

The greatest impact of all of these “human” impacts is the disruption to wildlife. The recent logging activity in particular creates a disruption in habitat and noise that impacts the surrounding areas as well.



Figure 4.12 A rare photo of a bobcat – taken through the railings of the ranch house balcony.

While there are several active natural gas well sites in the vicinity, there has been little or no new development in the area for the past ten years. Despite all of these activities, there is abundant wildlife in the area. Numerous ungulates inhabit the area as well as the more rarely seen black bear, cougar, and lynx.

Rural Tourism and Recreation

It is important to realize that one of the main reasons there is conflict between RTR and these various uses is that they are not consistent with the mythical vision that tourists and recreationalists may have towards the ‘countryside’. The buzzing of saws for forestry, the odour of sour-gas, the visual evidence of environmental destruction, and animal management practices may shock visitors. These harsh realities of rural environments may shatter the idyllic image that has been placed on rural areas and discourages visitors from returning. Additionally, these activities may limit RTR activities in some areas. For

example, sour gas wells require a setback distance from the wells in order to ensure safety.

Key Planning Issues: Competition for Rural Resources

Strengths	Weaknesses
<ul style="list-style-type: none"> • Ranch and farm activities may add value to the tourist experience. 	<ul style="list-style-type: none"> • Natural Gas extraction may be viewed negatively by some groups. It may also be a real or perceived danger associated with this industry. • Logging on adjacent lands may negatively affect viewscapes and disrupt wildlife in the area. • Livestock alter the natural ecosystems of the area.
Opportunities	Constraints
<ul style="list-style-type: none"> • Involve tourists in ranch and farm activities. • Potential to provide educational activities regarding resource extraction (forestry and natural gas). 	<ul style="list-style-type: none"> • Activities that occur on adjacent lands have the potential to greatly affect the setting of Alborak Stable and thus its aesthetic value. • Natural resource extraction is in the area for the long-term; any new development must consider the impacts of these adjacent activities, additionally, some of these industries are regulated by organizations other than the local municipality.

TABLE: 4.3.2

4.3.3 Attractions, Amenities and Activities

The Alborak Stable and the Juniper Ridge Ranch lands have many natural amenities. The landscape, flora, fauna, natural watercourses, and topography create a unique, diverse environment for visitors to enjoy. The wide variety of plants and animals provide opportunities for visitors to learn about and interact with the natural environment.

Juniper Ridge Ranch has property that borders Westover Lake. While the lake does not have fishing opportunities, it is host to beavers and waterfowl including



Figure 4.13 View of Westover Lake from the Ranch house

loons, herons, ducks, geese, and migrating swans. These natural amenities provide opportunities to develop educationally based RTR activities. Recreational opportunities that the lake provides include skating and canoeing. Although some areas of the lake are suitable for swimming, it is shallow with a lot of weeds and leeches that would discourage all but the most hardy of swimmers.

There are also numerous off-site attractions that have the potential to complement any RTR operation on the site. It is located within half an hour of

two tourists shopping villages: Cochrane and Bragg Creek. It is within 15 minutes of Kananaskis Country, which has numerous recreational facilities that are already in place. Finally, it is within an hour's drive to Banff and Canmore, perhaps two of the most important tourist areas within Alberta.

Currently, the primary purpose of a visitor to the Stable is to ride horses. The setting and facility creates an attractive environment for this activity to take place. In addition, it



Figure 4.14 Treed Trail located near the outdoor riding arena

provides riders the opportunity to ride on trails throughout the property and enjoy the rural environment. These trails also provide the opportunity for riders to condition their mounts in preparation for sports competitions. Viewing of wildlife is also an important feature for people riding at the Stable. The rider's lounge is stocked with books on wildlife and plants that are found in the area.

With numerous other attractions and activities in the vicinity, there is potential for future development to draw on these resources. Overnight accommodation in particular may increase the ability of the site to draw customers who are interested in exploring other tourism-related activities in the area. To date, the only overnight activity the farm has become involved with is hosting students

from Japan. Last summer, one student came for a week and lived with the family on the farm. This spring, a second student is coming for two months. The purpose of this exchange is to provide students with the opportunity to learn English and learn about animals and farm life.

The site also has the opportunity to further develop the equestrian facility. Many similar facilities hold riding competitions throughout the year. Currently, the Stable does not have the capacity to host such events. Development of additional riding rings, a cross-country course, stabling, and additional capital equipment would be required to host competitions.



Figure 4.14 View from hill behind Stable looking west

The Stable produces a newsletter called, Alborak Press, to keep visitors informed of coming events, clinics, and activities. The newsletter is issued on a quarterly basis. A copy of one of the issues may be viewed in Appendix C.

Key Planning Issues: Attractions, Amenities and Activities

Strengths	Weaknesses
<ul style="list-style-type: none"> • Very good year round equestrian facility. • The Stable has access to 800 acres of bridle trails, significantly higher than most equestrian facilities. • Three qualified riding professionals teach lessons on site. 	<ul style="list-style-type: none"> • Other industries (forestry, oil and gas) that operate in the vicinity reduce the rural aesthetic.
Opportunities	Constraints
<ul style="list-style-type: none"> • Further development of equestrian facilities; jumping rings, paddocks, cross-country course. • Development of additional recreational or tourism attractions and/or facilities such as canoeing, bird watching, bed & breakfast or cabin accommodation. • There is a lot of publicly held land in the vicinity that may present additional recreational opportunities in the future. • Establish linkages to other RTR activities in the vicinity. 	<ul style="list-style-type: none"> • Many of the desired additional equestrian facilities require large relatively flat land, of which there is very little on the property. • Development of additional facilities are capital intensive • New activities must be compatible with the existing Ranch and Stable activities. • New activities must be compatible with adjacent land uses (including resource extraction, farming etc.).

TABLE: 4.3.3

4.3.4 Social Interaction

Similar to many recreational activities, there is a strong social component to equestrian sports. The facility draws people with a similar interest in horses and it functions as a community. For many, horses are a passion and they enjoy sharing experiences and debating topics relating to horses. It is not uncommon for patrons to mingle in the viewing lounge once they have completed a training

session. On weekends, many will bring a bag lunch and spend the majority of the day on site.

For host family members and staff, it becomes difficult to discern social life from work. At times, the social demands of patrons make it difficult for family and staff to complete their chores. For family members in particular, there is a lot of pride in the business and the area, and all members share a passion for horses and thus enjoy the social interaction for the most part. Days off and having private areas on site, also provide family and staff with the opportunity to seek reprieve as needed.

Despite this somewhat rosy picture, difficulties do arise. Family life has merged with the business. Most of the family interaction takes place either “at the workplace” or in discussions about the workplace. Family get-togethers, particularly during peak business times, are rare. As is familiar to many farm operators, it is difficult to arrange times when all members of the family may be away from farm activities. Family vacations are unheard of, even for day outings.

Key Planning Issues: Social Interaction

Strengths	Weaknesses
<ul style="list-style-type: none"> • There is a strong interest in horses by family and staff members. • There are private areas on site that enable family and staff to seek reprieve from Stable activities. 	<ul style="list-style-type: none"> • At times it is difficult to separate work responsibilities from social activities of patrons. • Despite private areas on site, it is sometimes difficult to distance work from personal life.

TABLE: 4.3.4

4.3.5 Physical Environment

The property and surrounding properties had a fair amount of environmental disruption prior to the development of the Stable. Disruptions have been caused by cattle grazing, logging, natural gas recovery, and other human activities. The area is not in its natural state; nevertheless, many native plants and animals do continue to thrive in the area. The topography of the area is diverse as is illustrated by Figure 4.3, the contour map of the area. There are rocky ridges, wetlands, and steep slopes. The land is partly open pasture and partly treed. Some areas are heavily treed and difficult to navigate - even on foot. These natural elements are recognized as important features or attractions to the area. As such, in the development of Alborak Stable, negative impacts on the environment were minimized as much as possible.

In assessing the suitability of various land uses in rural environments, it is useful to refer to Canada's Land Inventory. This section will now briefly outline the subject lands categorizations under this inventory system and then describe some of the environmental impacts of Alborak Stable.

The Canada Land Inventory

The Canada Land Inventory is a classification system used to measure the capability of land in Canada for the uses of Recreation, Agriculture, Ungulate Habitat, and Waterfowl Habitat. The lands owned by Juniper Ridge Ranch and Alborak Stable are included in the inventory. The criteria used in evaluating the

land under each of these categories include soil quality, climate, and tree cover. Details of the criteria used for each category may be viewed in Appendix D. The classification system describes the land as follows:⁶²

Land capability for Agriculture: Class 6 and 7

Class 6 - Soils in this class are capable only of producing perennial forage crops, and improvement practices are not feasible.

Class 7 - Soils in this class have no capacity for arable culture or permanent pasture.

Land capability for Recreation: Class 4

Class 4 - Lands in this class have moderate capability for outdoor recreation.

Land capability for Water Fowl: Class 6

Class 6 - Lands in this class have severe limitations to the production of waterfowl.

Land capability for Ungulates: Classes 3 and 4

Class 3 - Lands in this class have slight limitations to the production of ungulates.

Class 4 - Lands in this class have moderate limitations to the production of ungulates.

Land capability for Forestry: Class 5

Class 5 - Lands having moderately severe limitations to the growth of commercial forests.

⁶² Source: Canada Land Inventory, at <http://ceonet.cqdi.gc.ca/cs/en/top/pub/fs.html>

Using the Canada Lands Inventory, the land may be assessed in terms of each of these uses. While these uses are not comprehensive, the classification system provides the reader with a greater understanding of the geography of the area and the principal possible uses. Notably, several possible uses are not included in this system such as suitability of the area for other wildlife and natural gas recovery.

The Canada Land Inventory for the case study would indicate that the physical environment is perhaps best suited for ungulates and recreational use with Class ratings at 3-4 and 4 respectively. It is important to remember, however, that applying this system in isolation of the other factors would be short-sighted and that it is only one set of criteria that should be assessed in determining the suitability of an area for RTR development.

The Environment and Alborak Stable

To efficiently manage horses, it is necessary to confine them. In doing so, environmental disruption is inevitable. Areas that have frequent use inevitably have native plants destroyed. With the native vegetation gone, erosion and stormwater management has become very important. Pasture rotation and manure management practices can further reduce environmental damage. The rolling topography and near surface bedrock in certain areas make working with the natural contours and environment even more challenging.

Alborak located the main equestrian facility in an area that required as little re-grading as possible; was near existing road, telephone, and power service infrastructure; services; had a good water supply; and was central to the existing farm operations. Some re-grading was required to ensure a level building area. Stormwater management required the use of weeping tiles, ditches and culverts. Despite that the facility is located on the top of a hill, numerous natural springs were discovered in the construction phases. These natural springs required additional stormwater management design solutions to minimize erosion and divert excess water to existing drainage courses.

Horse paddocks are purposefully located in an area that is convenient to the main facility in an area with very good natural drainage. Large pastures are used in rotation to maintain the native grasses. Logged areas have been seeded with a mixture of grasses that are suitable to the climate and soils. Manure that is collected from the stabling and horse paddock areas is spread in open pasture areas. For the interest of the reader, horse manure is considered one of the best natural fertilizers, far better than most other livestock including cattle, sheep, pigs, and goats. At this point in time, there is sufficient pasture available to rotate the spreading of manure. Other common agricultural practices are maintained. These include identifying and removing poisonous plants, avoiding over grazing, and weed control programs.

4.3.6 Business Skill and Knowledge

Collectively, family members have a diverse background in numerous areas. Most important to the development of this particular facility is a strong knowledge in the horse industry. Knowing the needs of riders and their mounts and being able to cater to these needs are essential to the business. Additionally, it is important to have business connections and networks established prior to development. Contacts include key service suppliers such as veterinary service providers, feed and bedding producers, farrier (blacksmith) service providers, and equipment providers. As previously stated, no formal marketing research was conducted. However, as *users* of facilities for numerous years, the family clearly understood the market's demand prior to entering into the initial planning stages of the facility.

Family members were also able to add specific areas of expertise drawing from experiences outside the horse industry including areas of commerce, engineering, consulting and teaching. Although Alborak Stable was the first family business venture, two members of the family had previously started and operated businesses. Perhaps the greatest challenge that the family has faced in the development of the business is hiring and supervising staff.

The family's agricultural background has also proved essential. Knowledge in feed storage, nutrition, pasture management, manure management, and animal management had all been previously undertaken by the family.

Legal advice was sought during the planning process. A law firm that specializes in Equine Law was able to provide key advice in the developing of the business policies. Contractual agreements are made for the care of all horses on the site. These agreements protect both the owners of the horses and Alborak Stable. Additionally, legal forms for the transferring of ownership of horses were composed. These are standard legal forms that are used as the need arises.

Under the provisions of the Livery Stable Keeper's Act, there is some protection to stable owners from customers whose accounts fall into arrears. In the event that a Stable is unable to collect monies owing from owners, they are able to recover their costs by selling the horse at public auction and any amounts in access of those owing are returned to the owners. Although this is an extreme action to take, it is comforting to know that such recourses are available to recover costs if need be.

Choosing the proper liability insurance policy was also an important business decision. As a requirement of the insurance policy, all riders are required to sign a release form before taking part in equine activities on the site. Additionally, Alborak has a policy that all riders must wear proper protective headgear at all times while mounted. Farm insurance policies cover the building, equipment, and livestock. Disability insurance has also been retained to protect the investment in the event that the family members who work the facility lose their ability to do so.

Key Planning Issues: Business Skill and Knowledge

Strengths	Weaknesses
<ul style="list-style-type: none">• Strong agricultural and equestrian background.• Strong background in business skills.• Knowledge of industry and potential suppliers to the facility• Strong knowledge of the target market (although no formal research was conducted).	<ul style="list-style-type: none">• Little or no experience hiring and supervising staff.

TABLE: 4.3.6

4.3.7 Financing

Financing Alborak Stable required vigorous business planning. The first phase was establishing a budget. Once a sketch plan of the facility had been completed by family members, numerous contractors had to be contacted to determine budget figures. A request for proposals for the building of the main facility was submitted to various construction companies. This in itself required substantial research. Budgeting research was also required for the selecting of all the building fixtures. Everything from lights and wheelbarrows to stalls, flooring, and footing in the arena had to be budgeted for. Outside of the building, budget was allotted for ground preparation, building of fences, and landscaping. Initial start-up costs for salaries, supply of hay, grain, and bedding (shavings) also had to be accounted for. Additionally, the budget included costs such as insurance, taxes, power, telephone, and natural gas installation.

Having compiled a detailed listing of materials and services, the family was able to put together some initial budgeting figures. This was followed by the development of pro-forma financial statements. In developing these statements, revenues and operating expenses also had to be estimated and taken into consideration. Pricing of services offered by the Stable were estimated at rates that are relatively standard in the industry. Occupancy of stalls (a convenient measure of capacity) was estimated at 50% for the first year of operation. In the month of April this year (1999), approximately one year since opening, the occupancy is 100%.

Obtaining financing also required substantial research. Lending institutions were approached with a package of business plans and pro-forma statements. Once again the benefits of each offering was evaluated and finally a loan was secured for the bulk of the development costs. Revenues generated from the sale of timber and the logging of some of the farm property also supplemented development costs. As the land was unencumbered, it was used as collateral for the loan. Without this collateral, separate from the business, it would not have been possible to secure a loan. This point is paramount. Essentially, if the business failed (or defaults on the loan at some point in the future), a significant portion of the farm lands could be lost.

Key Planning Issues: Financing

Strengths	Weaknesses
<ul style="list-style-type: none"> • Family members collectively had the business knowledge to prepare a complete financial and operational business plan. • Family had sufficient collateral (outside the business) to cover the loan. • Revenues generated from other farm activities (logging) were available to contribute to the development costs. 	<ul style="list-style-type: none"> • Venture is considered high risk by lending institutions and thus a solid business plan was needed that was resilient to rigorous scrutiny. • Family assets had to be posted to secure the business loan.

TABLE: 4.3.7

4.3.8 Public Policy

Alborak Stable is located in the Municipal District (M.D.) of Bighorn. The Municipality is bounded by Banff National Park to the west, Kananaskis Country to the south, the M.D. of Rocky View to the east, and the M.D. of Clearwater and Mountain View County to the north. It is a very diverse municipality that encompasses predominantly rural land. Alborak Stable is located in the southeast of the municipality in an area identified as being a part of the *Ranchlands*. Under the Land Use Bylaw it is designated as Agricultural Conservation District which provides for varied agricultural pursuits.

In the development of the facility, Alborak Stable was required to apply for both a development and a building permit for the construction of the facility. As the principal use is considered agricultural, no re-designation of the land was

required. Although the process of obtaining the required permits was not complex, it was time consuming and the Municipality required several revisions to the building design. The main reason for these revisions is that Riding Arenas have recently been reclassified as public facilities and thus require a higher building standard than was proposed under the initial building design.

Upon application to the Municipality, the Development Permit application was advertised in the local newspaper to inform other community members of the development proposal. To the best knowledge of the family, no members of the community objected to the development. Had strong opposition been met by adjacent landowners, the development might not have proceeded.

Under the provisions of the Municipal Government Act (MGA), the MD was required to develop a Municipal Development Plan (MDP). The purpose of the MDP is to guide the overall development within the Municipality. Public involvement was sought in the development of the MDP through newsletters, open houses, and a formal public hearing. The MDP operates in concert with the Municipality's Land Use Bylaw (LUB) to guide municipal decision making regarding land-use, development, growth patterns, infrastructure, economic and environmental issues. Together, these documents contain policies that serve to guide long range planning in the Municipality. It is therefore, prudent to evaluate potential future development on the site within the context of the MDP and LUB.

To determine the Municipality's philosophy of further RTR development on the site, a review of the its Land Use Bylaw (LUB) and Municipal Development Plan (MDP) was conducted. Because of its close proximity to major tourist destinations, the Municipality has experienced significant tourism and recreation development pressures particularly in the western portions of the MD and thus has adopted several policies that specifically focus on recreational and tourism development.

The newly adopted Municipal Development Plan (MDP) of the M.D. of Bighorn recognizes tourism and recreation pressures and has established several policies to guide its development. Policies within the MDP that are specific to the *Ranchlands* areas (in which Alborak Stable is located) generally support low impact RTR and are now listed:

- Densities of proposed recreational developments of less than one person per acre may be considered. Proposals with densities greater than one person per acre require an Area Structure Plan.
- Recreational activities may be considered provided that there is adequate access and they demonstrate that any negative impacts to the environmental, social and agricultural fabric of the area can be mitigated.
- Recreational uses may be allowed in Rural Conservation areas (including the Alborak Site), provided the following conditions are met:
 1. No significant alteration of the natural landscape;
 2. Uses the natural landscape features found on and adjacent to the development site;
 3. Does not require centralized water and sewer systems;

4. Does not require significant transportation or intersectional improvements due to increased traffic levels.
 5. Does not involve the operation of motorised vehicles such all terrain vehicles, snowmobiles, motorcycles or other significant noise generating activities.
- Home occupations (which include Bed and Breakfasts) are a discretionary use under Alborak Stable's current land use designation; however the number of rooms is limited to two.

Key Planning Issues: Public Policy

Opportunities	Constraints
<ul style="list-style-type: none"> • Able to apply for the development of a Bed and Breakfast without a re-designation of land use. • The Municipality has recognized the importance of tourism in the area and has taken a pragmatic approach to RTR development. • Provided that access, social, and environmental issues are addressed, the Municipality will consider small-scale tourism and recreational developments. 	<ul style="list-style-type: none"> • The limit on the number of rooms for a Bed and Breakfast is two; it may be difficult to generate enough revenues from only two rooms to cover business costs (such as advertising, renovations etc.). • Proper public access will remain the major deterrent to development and development of these roads would be extremely costly. • Larger facilities that require centralized water and sewer systems are discouraged.

TABLE: 4.3.8

4.4 Key Success Factors

In the author's opinion, the development of the RTR enterprise, Alborak Stable, has been a success and shows much potential for the future. The Stable has a much greater occupancy of stalls than was anticipated and horse sales have been slightly lower. Moreover, it appears that the facility will be successful in the long-term because it has differentiated itself from other operations and is able to provide patrons a top recreational facility in an enjoyable setting.

While the reader is encouraged to determine their own views, the author suggests that the development of Alborak Stable is successful for the following key reasons:

- Commitment by all of the family players to the business.
- Strong knowledge and background in the horse industry.
- Relatively strong business knowledge.
- Strong financial resources.
- Provide riders and their mounts with top facilities and amenities.
- Proximity to important transportation routes.
- Proximity to population centres (the business draws people from Cochrane, Springbank, Calgary, Banff, and Canmore).

4.5 Future Business Plans

The initial success of Alborak Stable and the existing public policies in the area would suggest that the site has potential to further develop. Further development could either build on the existing horse operation or be a separate development. New developments may be either new profit centres or provide additional services or facilities. New profit centres would include ventures such as a Bed and Breakfast, a restaurant, a retail store for horse supplies and equipment, or larger ventures such as a Country Inn, cabin accommodation, or a conference retreat centre. Additional services or facilities may draw additional customers to use the services offered by the existing business.

Any new developments would need to satisfactorily address issues that arise in each of the categories of access, competition for rural resources, attractions, social interaction, physical environment, business skill and knowledge, financing,

and public policy. By looking at the issues that surround these various topics, decision-makers (the operators) will be directed to consider concerns in each of these areas. In assessing alternative development scenarios, decision-makers must measure the relative costs and benefits of each option. Trade-offs are inherent in business and planning decisions and by taking this holistic approach in evaluating the merits of future development, decision-makers will have the ability to make informed decisions.

For Juniper Ridge Ranch and Alborak Stable, the greatest barrier to further development is access. Without a public road leading to the property, further development seems unlikely. Ironically, it is the lack of public access that has maintained the area in its present natural state and made it a desirable location for RTR development. Furthermore, if a public road is constructed to provide access, it will be extremely difficult to maintain the current attractiveness of the area. Development of a public road to the area is unlikely in the short-term. Due to the topography, including rocky ridges, steep slopes, and wetlands, the development of a road is cost prohibitive. Yet without proper access, any further development of the site at this time would likely be considered premature by the local authorities.

Adequate financing and staffing are also major obstacles that the family would need to overcome in any future development. Additionally, planning issues surrounding the physical environment; business knowledge; attractions, amenities and activities; and competition for rural resources should be fully

explored in conjunction with the goals and objectives of the family in assessing any further development scenarios. Further development may also affect adjacent landowners (whether they reside in the immediate vicinity or not) and thus consultation with these groups would also be necessary.

4.6 Case Summary

The development of Alborak Stable is a case study of an RTR enterprise developed in rural Alberta. Numerous barriers including high capital costs, difficult financing, substantial research, lack of available staff, lack of public road, and distance to markets were overcome. The principal motivation for the family to become involved in the development of the facility is lifestyle choice; however, profitability of the enterprise is considered critical. The business prepares formal business goals that are aimed at keeping the business growing and increasing profit margins. On-going challenges that are anticipated by the business include availability of qualified staff, separating business from personal life and finding time for family activities. The most important factor that enabled the business to come into being is the strong shared vision of family members and the desire to bring it to reality.

CHAPTER FIVE: CONCLUSIONS

5.1 Findings and Recommendations

This project proposes that the development of RTR enterprises is highly contextual and thus requires special planning considerations. It defines Rural Tourism and Recreation (RTR) as activities engaged during leisure time in rural areas. Spatially, it focuses on the areas that lie between the outer edge of the urban fringe and the wilderness. The project concentrates on RTR activities that take place on private land that is under agricultural use in Alberta. RTR in general may also include activities that take place in rural areas including small towns and rural parks.

The study identifies three driving forces that are placing pressures on the rural landscape. First, rural economies have experienced shifts resulting from changes in technology, society, and world economies. Second, patterns of recreation in rural areas have changed. This change is principally driven by an increase in demand for rural recreation and tourism activities by urbanites. Third, recreational activities themselves are evolving. Contemporary RTR activities are active and competitive whereas traditional activities are more passive. These

new activities create demand for access to rural areas as many of them require large tracts of land and are enhanced by a rural setting.

Many urbanites are drawn to the image of rural areas regardless of whether or not this image is real or perceived. RTR operators paint a romantic, nostalgic, image of rural areas that play on notions of nature, health, and revival of family roots or memories. Heightened societal concern and awareness for the environment and an increased desire for activity-based recreational pursuits have created demand for activities that are consistent with this rural image. With urbanites seeking rural experiences and farms looking to diversify, there is a potential for farmers to capitalize on this supply and demand imbalance by developing RTR enterprises.

This study has found that there has been little comprehensive RTR research to date and that there is a lack of data on RTR enterprises in general. Analysis of RTR is further hindered because statistics are not usually collected in a manner in which RTR may be differentiated from other types of tourism.

The literature review of RTR development reveals various motivations and barriers to RTR development on private land. Both the literature review and the case study found that the principal motivators for RTR development on private land are twofold. Operators develop RTR enterprises as a lifestyle choice and to increase farm income. Principal barriers to development in the case study were

the securing of financial backing and social impacts on the host family. These same motivators and barriers are consistent with those found in the case study.

In assessing a RTR development, the study proposes eight factors or criteria that should be considered by landowners. These include the issues that surround each of the categories of Access; Competition for Rural Resources; Attractions, Amenities and Activities; Social Interaction; Physical Environment; Business Skill and Knowledge; Finance; and Public Policies. These categories should not be viewed in isolation from one another; nevertheless, grouping them serves as a practical means for understanding the complexities that surround RTR enterprises. Each of these factors is now summarized and recommendations are made for landowners and public authorities to consider.

Access

Access is important from both a marketing and technical perspective. The potential RTR site should be accessible to the specific target markets it seeks. Additionally, the transportation network and infrastructure must be able to withstand the additional traffic generated by the development. The study found that accessibility factors have the potential to vary substantially with the type of RTR enterprise developed. Therefore, in assessing the issues and developing of policies regarding RTR and access, the specific type of activities must be considered.

Recommendations to Landowners:

Consideration should be given to the availability of access by target markets to the potential development site. Does access pose a barrier? If so, how can this barrier be overcome?

Competition for Rural Resources

The case study illustrates intense competition for rural resources. It also found that there are many limitations to managing conflicts between these uses.

Recommendations to Landowners:

A strategy for the integration of existing land uses with any proposed RTR enterprise should be developed. As a landowner, knowledge of other industry activities operating in the area will prove advantageous in planning a development. Visual and oratory aesthetics as well as health and safety considerations will help identify negative aspects of other activities taking place in proximity to a specific site. The landowner should determine if the apparent impacts of adjacent land uses pose a material barrier to RTR and if so, determine whether or not these impacts could be mitigated through design or the type of RTR enterprise developed.

Attractions, Amenities and Activities

This study has found that the principal attraction of visitors to rural areas is the "rural image." While this image is not necessarily realistic, it is perhaps the quintessential element in any RTR enterprise development. This rural image provides a favourable backdrop for other RTR leisure pursuits. Additionally, RTR enterprises with a residential component have the ability to take advantage of attractions and activities that take place off-site.

Recommendations to Landowners:

In determining the potential of a particular site for RTR development, consideration should be given to the rural aesthetic and amenities of the area. Activities proposed should give regard to the existing agricultural uses and an assessment of their mutual compatibility should be determined. Additionally, where residential uses are considered, off-site attractions may support demand for this use. It is recommended that landowners inventory the potential activities and amenities at the proposed location and within its proximity. This will assist in determining the possible range of opportunities for RTR development on the site, which then may be evaluated for their particular suitability for the specific location and host family.

Social Interaction

Both the literature review and case study found that those involved in family-operated RTR enterprises often have difficulty separating their personal family life from their business life. This becomes an important consideration for those

contemplating hosting RTR enterprises. Persons who place high values on privacy are not likely to find RTR enterprises suitable while those who enjoy social interaction with guests, may find such developments rewarding.

Recommendations to Landowners:

Landowners considering development of an RTR enterprise should be conscious of their own social needs and determine whether or not they are suited to hosting guests on a regular basis.

Physical Environment

As an important part of the sustainability of RTR enterprises, the long-term effects of development on the environment are important considerations. The physical environment is interwoven with the attractiveness and desirability of the site and thus great care must be taken to minimize environmental effects of development. The case of Alborak Stable found that environmental impacts were not avoidable; however, proper farm and environmental management practices are able to mitigate many of these issues. Management techniques used in the case include stormwater management, pasture rotation, manure management, and weed control.

Recommendations to Landowners:

Recognition of the potential environmental impacts of various RTR activities and possible mitigative measures should be assessed in determining the suitability of

specific activities for a site. Landowners should research RTR activities that they are considering hosting to determine the environmental affects they may have. Landowners should determine whether these impacts are material and whether or not the effects could be mitigated.

Recommendations to Municipal Authorities:

In assessing applications for RTR development, authorities should determine whether the proposed development poses any long-term environmental impacts and be assured that developments do not negatively impact adjacent lands. For example, stormwater management plans may be required by a development to ensure that adjacent lands are not jeopardised. Municipalities should adopt bylaws that require developments to provide environmental information including Environmental Impact Assessments, Surface and Groundwater Assessments, Geotechnical Studies, and Stormwater Management Plans.

Business Skill and Knowledge

Business skill and knowledge was found to be an important factor to consider in the development of RTR enterprises. One of the principal success factors of Alborak Stable, was the combined business skill and knowledge of the horse industry by family members.

Recommendations to Landowners:

Those persons considering developing RTR enterprises should obtain necessary business skills prior to development. Doing so increases the possibility of success of the venture.

Financing

The literature found that one of the principal barriers to RTR development was the securing of financial resources to proceed with development. This was viewed as the greatest barrier in the case study of Alborak Stable.

Recommendations to Landowners:

It would be prudent for landowners to research possible venues for available small business loans and grants. In Alberta, a good starting point would be contacting Alberta Economic and Development.

Public Policy

Within the context of the Case Study, tourism and recreational policies for the MD of Bighorn were reviewed. It is encouraging to see that there are some policies in place that aim to define the types of developments that are considered suitable. While these policies are a starting point, they are limited by the lack of integration of various government authorities. In particular, difficulties arise between RTR and other natural resource based uses such as forestry and natural gas. The natural gas industry is regulated by the AEUB (Alberta Energy and Utilities Board) whose actions are not required to conform to policies and

plans of local municipalities. Conversely, Municipalities must conform to decisions made by the AEUB.

Recommendations to Landowners:

Public planning processes vary from municipality to municipality, landowners should contact their local authorities to determine the specific process that should be followed. Authorities may also be able to help identify potential development issues that may arise. Landowners should also ask about the application process as well as the fees and the length of processing time that should be budgeted for.

Recommendations to Public Authorities:

It is recommended that the provincial government investigate adopting a land use planning structure that facilitates communication and co-operative planning decisions between various regulatory bodies.

Authorities should develop a recreational and tourism development plan that would enable proactive management of RTR development pressures.

Regional RTR strategies should be developed across municipal borders either as a part of an Intermunicipal Development Plan or through a separate strategic planning document.

Local municipalities should develop sound policies to direct future RTR development within their jurisdiction. These plans and policies, however, must recognize their limitations within the Alberta planning context.

Authorities should reassess their land management strategy within the context of a changing rural economy. In 1995, 18 % of Alberta farms had diversified into non-farm businesses.

Policy direction of RTR should focus on the suitability of the specific lands for development and consider the suitability and capacity for the land to sustain RTR and other competing uses (forestry, agriculture, wildlife, and resource extraction e.g. natural gas or oil recovery).

RTR enterprises developed in tandem with farm activities and that are compatible with adjacent land uses should be encouraged .

RTR policies should consider the sustainability of the economic, social, and physical environments over the long-term.

5.2 Areas for Further Study

There are numerous areas for further study within the field of RTR enterprises as there are various underlying themes that have emerged from this study. These topic areas include research into the areas of family-based business; recreational planning; a study of existing policies, statutes and plans in Alberta; and natural resource and industry management studies. An interesting project to follow this additional research would be the development of a policy document that would guide the development of RTR in Alberta.

5.3 Conclusion

This Master's Degree Project has determined the principal issues that surround RTR on privately owned agricultural land in Alberta. Through the use of two methods of investigation (a literature review and a case study), the study has found that the issues surrounding RTR are complex with a wide number of variables that should be considered when assessing potential development of an RTR enterprise. Grouping these variables into the eight categories proposed provides a practical means of understanding these issues. By analyzing potential RTR enterprises in terms of each of these categories, potential operators and authorities may be more informed in making decisions regarding RTR development.

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Natural Resources Canada Website at: <http://ceonet.cgdi.gc.ca/>

Statistics Canada at: <http://www.statcan.ca/>

APPENDIX A



PROMOTING SMALL-SCALE RTR ENTERPRISES

APPENDIX A

Promoting Small Scale RTR Enterprises

The purpose of promotion is to stimulate transactions that otherwise would not have occurred.⁶³ The RTR enterprise must determine the best means of contacting their target market and make them aware of the business. Traditional forms of advertising including print, radio, and television are most known and recognized, however successful campaigns using these media tend to be cost prohibitive for smaller organizations. Perhaps the most important means of advertising and promotion for RTR enterprises is through associations. There are numerous such groups in many specialized areas including Bed & Breakfast Associations, Regional Tourist Associations and Information Centres, and Recreational Clubs centred around specific interests such as Horses, Bird Watching, Hiking, and Canoeing.

Recent studies (Williams, 1997; Oppermann, 1995) indicate that the most commonly used forms of advertising for rural farm-based businesses include the following:

- Word of mouth
- Signage (directing people to the farm)
- Newspaper advertising
- Brochures
- Tourism related publications
- Agricultural related publications
- Consumer and trade show exhibits
- Direct mail campaign
- Public relations

⁶³ Heath, E. and Wall, G. (1992) Marketing Tourism Destinations, John Wiley and Sons, p. 153.

Although the articles surveyed made no mention of Internet Marketing, it is anticipated that this medium of advertising will become increasingly important to RTR enterprises. Researching specific types of tourism and recreation through the Internet by consumers themselves gives them the opportunity to seek out specific RTR experiences. It is also important to note in a recent German study that, farms surveyed "rely primarily on word-of-mouth advertising and a high return-visitor rate."⁶⁴

Another means of promotion is familiarisation or FAM tour. The FAM tour involves hosting a prominent person or persons in the industry, that have access and influence on the target market group, to come and see or use the facility (in this case the RTR enterprise). The purpose is to have these *influential* people portray a positive view of the facility to the target market through direct contact with the market group or through written reviews or commentary. In various forms, this type of marketing is pervasive in the tourism and hospitality industry. It is probably most commonly understood in the restaurant, theatre, and movie industries where 'critics' present reviews on the product.

⁶⁴ Oppermann, Martin. (1995) "Holidays on the farm: A case study of German hosts and guests," Journal of Travel Research Vol. 34, No.1

APPENDIX B



SAMPLE PRO-FORMA STATEMENTS FOR STABLES

Table No. 1 Capital Investment Requirements for Small Boarding Stable

	Monthly Rate	No.	Total Revenues
Revenues			
Full board	\$250	12	\$36,000
Pasture board	\$110	8	\$10,560
Training			
Lessons			
Sales commissions			\$2,500
Specialized care			
		Total Revenues	\$49,060
Operating Costs			
Grass hay			\$4,997
Commercial horse feed			\$2,235
Salt & mineral			\$250
Bedding			\$900
Hired labour			\$12,000
Utilities			\$3,000
Equipment Operating Costs			\$3,000
Facilities repairs			\$3,000
Pasture expenses			\$500
Insurance			\$5,000
Interest on operating			\$500
		Total Operating Costs	\$35,382
Fixed Costs			
Interest on land			\$6,000
Interest on fencing & facilities			\$1,720
Interest on equipment			\$1,000
Depreciation on fencing & facilities			\$1,800
Depreciation on equipment			\$5,000
Land taxes			\$1,500
		Total Fixed Costs	\$17,020
Total Costs			\$52,402
Net Profit			-\$3,342

Interest costs are the opportunity cost of using capital estimated at 8%

- Table No. 2 presents estimates for the feed costs for the proposed boarding stable operation.

Table No. 2 Boarding Stable Feed and Bedding Requirements

	Days on Feed	Pounds per Head per Day	Total Tonnes Fed	\$/Tonne	Cost per Head	No. of Head	Total Cost
Full Board							
Commercial Feed	365	5	0.83	\$225.00	\$186	12	\$2,235
Grass Hay	365	20	3.31	\$80.00	\$265	12	\$3,179
Total							\$5,414
Pasture Board							
Grass Hay	250	25	2.84	80	\$227.20	8	\$1,817.60
Total							\$1,817.60

- Table No. 3 estimates the expected revenues and expenses of the proposed boarding stable operation.

Table No. 3: Estimated Annual Operating Revenues and Expenses

	Monthly Rate	No.	Total Revenues
Revenues			
Full board	\$250	12	\$36,000
Pasture board	\$110	8	\$10,560
Training			
Lessons			
Sales commissions			\$2,500
Specialized care			
		Total Revenues	\$49,060
Operating Costs			
Grass hay			\$4,997
Commercial horse feed			\$2,235
Salt & mineral			\$250
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Utilities			\$3,000
Equipment Operating Costs			\$3,000
Facilities repairs			\$3,000
Pasture expenses			\$500
Insurance			\$5,000
Interest on operating			\$500
		Total Operating Costs	\$35,382
Fixed Costs			
Interest on land			\$6,000
Interest on fencing & facilities			\$1,720
Interest on equipment			\$1,000
Depreciation on fencing & facilities			\$1,800
Depreciation on equipment			\$5,000
Land taxes			\$1,500
		Total Fixed Costs	\$17,020
Total Costs			\$52,402
Net Profit			-\$3,342

Table No. 4: Projected Cash Flow Budget

	Year 1	Year 2	Year 3	Year 4	Year 5
Cash Outflows					
Land	\$75,000				
Facilities	\$43,000				
Equipment	\$25,000				
Total Capital Investment	\$143,000				
Commercial feed	\$2,235	\$2,235	\$2,235	\$2,235	\$2,500
Hay	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Bedding	\$900	\$900	\$1,000	\$1,000	\$1,000
Salt & mineral	\$250	\$250	\$250	\$300	\$300
Hired labour	\$12,000	\$12,500	\$12,500	\$12,500	\$12,500
Utilities	\$3,000	\$3,000	\$3,000	\$3,500	\$3,500
Equipment operating costs	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Facilities repairs	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Pasture expenses	\$500	\$500	\$500	\$500	\$500
Insurance	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Interest on operating	\$500	\$500	\$500	\$500	\$500
Land taxes	\$500	\$500	\$500	\$500	\$500
Total Operating Expenses	\$35,885	\$36,385	\$36,485	\$37,035	\$37,300
Personal withdrawals	\$5,000	\$5,000	\$4,000	\$5,000	\$5,000
Annual debt payment	\$7,170	\$7,170	\$7,170	\$7,170	\$7,170
Total Cash Outflows	\$191,055	\$48,555	\$47,655	\$49,205	\$49,470
Cash Inflows					
Borrowed capital	\$75,000				
Equity contribution	\$68,000				
Revenues					
Board	\$46,560	\$46,000	\$46,000	\$47,000	\$48,000
Other income	\$2,500	\$2,500		\$0	\$0
Total sales revenues	\$49,060	\$48,500	\$46,000	\$47,000	\$48,000
Total Cash Inflows	\$192,060	\$48,500	\$46,000	\$47,000	\$48,000
Net Cash Revenues	\$1,005	-\$55	-\$1,655	-\$2,205	-\$1,470
Cumulative Cash Flows	\$1,005	\$950	-\$705	-\$2,910	-\$4,380

Source: Alberta Agriculture Website at: http://www.agric.gov.ab.ca/agdex/400/460_830-

[1.html](#)

APPENDIX C



Alborak Press:

The Stable's Quarterly Newsletter

ALBORAK PRESS

Volume 1.4

Fall 1998



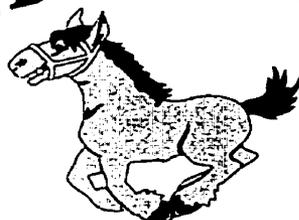
Summer Students

On behalf of Alborak Stable, I would like to extend my sincere thanks to Aoife Donnelly, Johanna Kalkreuth, Sarah Phillips, and Lisa Simpson for taking part in our first working student program this past summer. The efforts of this team of students did not go unnoticed as they became actively involved in all aspects of the stable. Our confidence in their abilities and judgement, enabled Sandra and I more time to train and coach. We are continuing this program next summer and hope to make it even more successful. Congratulations to our students on all the progress they made this summer.

- Sarah Poole



CALENDAR OF EVENTS



September 25-27
Sept. 30 - Oct. 3

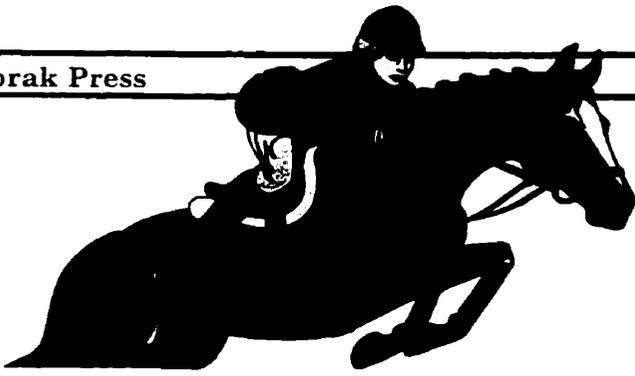
October 6-7

October 9-11

November 20-22

Chase Creek Event, BC
Spruce Meadows Auction
Watch for Liberty in the Sale Ring
Alborak PNH Lesson Clinic
Back by popular demand.
Canadian Warmblood Fall Sale
Six horses from Alborak in Sale.
Gail Ross Clinic





Alborak Clinic Update

A jumping clinic taught by Sandra Donnelly and Sarah Poole was held August 25-27, 1998 and was enjoyed by 25 participants including a class of parents who had a great time and entertained themselves and the audience. These clinics will be run monthly starting in January.

June 14, 15, 16 saw over 20 participants in a jumping clinic with Gail Ross of San Juan Capistrano, CA. Gail's enthusiasm and candor ensured that all had a wonderful time while gaining new skills. A Sunday night social gave Gail's students (old and new) a opportunity to catch up and make new acquaintances. We are looking forward to having Gail return to teach this **November 20-22**.

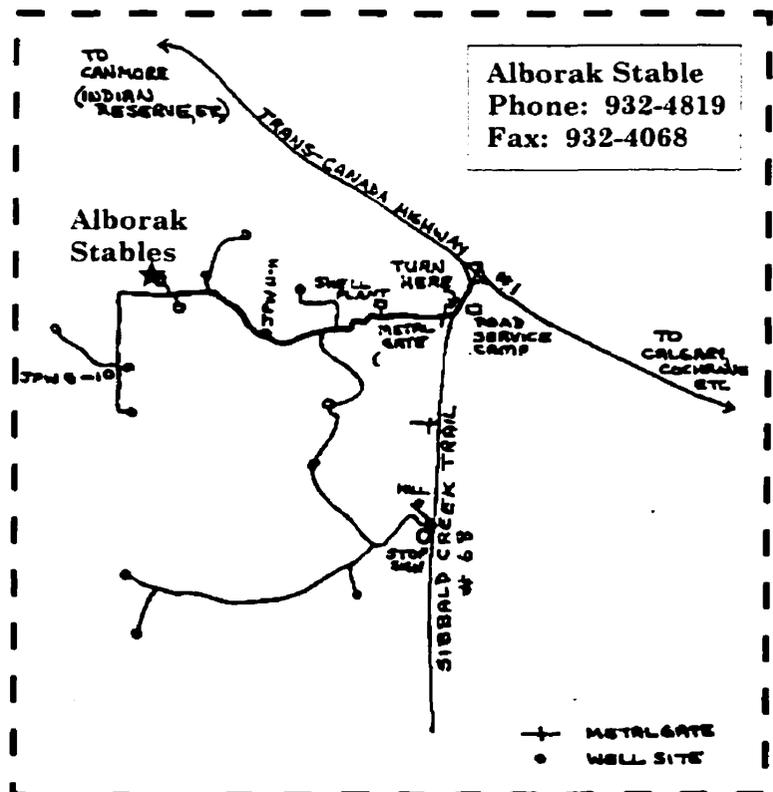
Back by popular demand!! **Parelli Natural Horseman.ship (PNH) Lessons** drew numerous horse lovers of all disciplines July 29 and 30, 1998 to Alborak Stable. Under the guidance of Larry and Leslie Stewart of PNH Canada, fifteen participants had the opportunity to learn more about this revolutionary training method. Larry, a certified Parelli instructor introduced participants to a new means of understanding horses that will foster improved relationships between riders and their mounts. As we had such positive feedback, Alborak is hosting another set of lessons this fall on **October 6 and 7, 1998**. There was a waiting list to enter the last clinic so please register early to ensure your place in the clinic by calling Sarah Poole at the Stable: 932-4819.

Summer Camps. Alborak hosted riding camps July 6-10, July 20-24, and August 17-21 with over 40 participants taking part in riding, stable management, and horse care lessons. The camps included jumping & flat lessons, a trail ride, and a mini-show. The weather cooperated and a fabulous time was had by all.

Excellent Training Facilities Located in the Foothills

Just a stone's throw away from Calgary, Alborak Stable is located in Alberta's beautiful foothills. Valleys, lakes, meadows and the Rockies provide a wonderful background for riding adventures. Extensive bridle paths ensure plenty of hacking/trail riding opportunities with over 640 acres for you to enjoy! The 100' X 200' indoor arena assures year round comfort, but on sunny days, enjoy the large outdoor sand ring. After an invigorating ride, jump in the shower and relax in the viewing lounge! Stabling information is available by calling 932-4819.

Directions to Alborak Stable
Head west from Calgary on the Trans-Canada highway. Turn South on Sibbald Creek Trail (35 Km from the city limits). Take your first right turn (just 500 m South of Highway #1). Follow the main road 5 Km and you will see the stable on your right. Please refer to the map.



Alborak Stable
Phone: 932-4819
Fax: 932-4068



ALBORAK

Many people have asked us where the name Alborak originated so I thought I would do some quick research on it. Al Borak was the name of the mythical horse that archangel Gabriel brought to Muhammad to carry him to the seventh heaven. Here are two descriptions I was able to find on the internet:

"Borak was a fine-limbed, high-standing horse, strong in frame, and with a coat as glossy as marble. His colour was saffron, with one hair of gold for every three of tawny; his ears were restless and pointed like a reed; his eyes large and full of fire; his nostrils wide and steaming; he had a white star on his forehead, a neck gracefully arched, a mane soft and silky, and a thick tail that swept the ground."- Croquemitaine, ii. 9.

Borak or Al Borak (the lightning). It had the face of a man, but the cheeks of a horse; its eyes were like jacinths, but brilliant as the stars; it had the wings of an eagle, spoke with the voice of a man, and glittered all over with radiant light. This creature was received into Paradise.

With this definition, I thought that I ought to find out who Muhammad was. The following from Compton's Interactive Encyclopedia (1996):

MUHAMMAD (570?-632). is no God but Allah, and Muhammad is the Prophet of Allah. This is the fundamental statement of faith in Islam, and it declares that Muhammad is the founder of one of the world's major religions. He was also the founder of a state by his unification of Arabia. Within decades after his death his followers sent out armies that conquered the whole Middle East, North Africa, and Spain. This vast territory was unified, at least temporarily, in an Islamic empire. Eventually the Byzantine (Eastern Roman) Empire, too, fell to Islam. The religion Muhammad founded became one of the most potent cultural forces in the world. In the 20th century it plays a decisive role in the politics of the Middle East, Africa, and Central Asia.

The mythology of almost every Western culture includes the horse as an important character. For example, in Greek mythology the sun god, Apollo, crossed the heavens each day in a chariot drawn by fiery steeds. Another famous Greek horse was Bellerophon's flying horse Pegasus, who was placed among the stars. Norse myths tell the story of the hero Sigurd, who rides a brave stallion through a wall of magic fire to rescue the heroine Brynhild. --Karen Donnelly



What's in a Name?

APPENDIX D



Canada Land Inventory: Factors used in evaluating land capability.

This information has been adapted from the

Natural Resources Canada Website at:

<http://ceonet.cgdi.gc.ca/>

Overview Of Classification Methodology For Determining Land Capability For Agriculture

Some of the important factors on which agricultural classification is based are: 1) The soils will be well managed and cropped, under a largely mechanized system. 2) Land requiring improvements, including clearing, that can be made economically by the farmer, is classed according to its limitations or hazards in use after the improvements have been made. Land requiring improvements beyond the means of the farmer is classed according to its present condition. 3) The following are not considered: distances to market, kind of roads, location, size of farms, type of ownership, cultural patterns, skill or resources of individual operations, and hazard of crop damage by storms. 4) The classification does not include capability of soils for trees, tree fruits, small fruits, ornamental plants, recreation, or wildlife. 5) The classes are based on the intensity, rather than kinds, of their limitations for agriculture. Each class includes many kinds of soil, and many of the soils in any class require unique management and treatment. 6) Land given a capability classification of 6 or 7 will never warrant irrigation since the benefits derived from irrigation would be negligible. For this reason, capability Classes 6 and 7 will always appear in the non-irrigated portion (Classes A to C) of a land unit classification.

Land Capability Class Descriptions for Agriculture

The classes indicate the degree of limitation imposed by the soil in its use for mechanized agriculture. The subclasses indicate the kinds of limitations that individually or in combination with others, are affecting agricultural land use.

Class	Description
--------------	--------------------

- | | |
|---|--|
| 1 | Soils in this class have no significant limitations in use for crops. |
| 2 | Soils in this class have moderate limitations that restrict the range of crops or require moderate conservation practices. |
| 3 | Soils in this class have moderately severe limitations that restrict the range of crops or require special conservation practices. |
| 4 | Soils in this class have severe limitations that restrict the range of crops or require special conservation practices. |
| 5 | Soils in this class have very severe limitations that restrict their capability in producing perennial forage crops, and improvement practices are feasible. |
| 6 | Soils in this class are capable only of producing perennial forage crops, and improvement practices are not feasible. |
| 7 | Soils in this class have no capacity for arable culture or permanent pasture. |
| 0 | Organic Soils (not placed in capability classes). |

Overview Of Classification Methodology For Determining Land Capability For Recreation

The increasing demand of land for parks and other outdoor recreation space made recreation an important consideration for the Canada Land Inventory program. The primary objective of the Recreation Sector was to provide an estimate of the quantity, quality, and location of outdoor recreational lands in the settled portions of Canada as basic information for planning recreational use of the resource. The inventory classes recreational land-use capability from Class 1 with very high capability to Class 7 with very low capability.

The basis of the classification is the quantity of recreational use that a land unit can attract and withstand without undue deterioration of the resource base, under perfect market conditions. "Quantity" may be measured by visitor days, a visitor day being any reasonable portion of a 24-hour period during which an individual person uses a unit of land for recreation. "Perfect market conditions" implies uniform demand and accessibility for all areas, which means that location relative to population centres and to present access do not affect the classification. Thus, a land unit with a high capability feature such as beach could accommodate a large number of users with a lower risk of major damage to the beach area, whereas an alpine meadow would rank much lower because heavy use by visitors would very quickly damage the fragile ground cover.

Intensive and dispersed activities are recognized in the classification. Intensive activities are those in which relatively large numbers of people may be accommodated per unit area, such as a beach. Dispersed activities are those which normally require a relatively larger area per person, such as backcountry camping. Land units are further qualified as being either shoreland or upland. Land units designated as shoreland adjoin a water body that is capable of supporting reasonably larger recreational activity such as family boating. Water bodies which are not large enough to support significant recreation activity (such as a pond or small lake) are considered as upland units even though their dominant recreation features may be associated with water (such as angling or canoeing).

The information provided by recreation maps can be used in the preparation of provincial and regional land-use plans, park planning, the disposition of crown lands, and in the reservation of public recreation lands.

Some important factors concerning the classification of recreation land are:

The purpose of the inventory is to provide a reliable assessment of the quality, quantity, and distribution of the natural recreation resources within the settled parts of Canada.

The inventory is of an essentially reconnaissance nature, based on interpretation of aerial photographs, field checks, and available records, and the maps should be interpreted accordingly.

The inventory classification was designed in accordance with popular preferences in non-urban outdoor recreation. Urban areas (generally over 1,000 population with permanent urban character), as well as some non-urban industrial areas, are not classified.

Land is ranked according to its natural capability under existing conditions, whether in natural or modified state; but no assumptions are made concerning its capability given further major artificial modifications.

Sound recreation land management and development practices are assumed for all areas in practical relation to the natural capability of each area.

Water bodies are not directly classified. Their recreational values accrue to the adjoining

shoreland or land unit.

Opportunities for recreation afforded by the presence in an area of wildlife and sport fish are indicated instances where reliable information was available, but the ranking does not reflect the biological productivity of the areas. Wildlife capability is indicated in a companion series of maps.

Land Capability Class Descriptions for Recreation

Classes

The classes indicate the degree of opportunity for recreational use.

Class	Description
1	Lands in this class have very high capability for outdoor recreation.
2	Lands in this class have a high capability for outdoor recreation.
3	Lands in this class have a moderately high capability for outdoor recreation.
4	Lands in this class have moderate capability for outdoor recreation.
5	Lands in this class have moderately low capability for outdoor recreation.
6	Lands in this class have low capability for outdoor recreation.
7	Lands in this class have very low capability for outdoor recreation.

Overview Of Classification Methodology For Determining Land Capability For Ungulate Wildlife

The mapping of land capability for ungulates follows a national system developed with the aid of the Canadian Wildlife Service and the game branches of the provinces. The ungulate sector uses seven classes, like the others. Capability for ungulate production implies a sufficient quantity and quality of food, protective cover, and space to meet the needs for survival, growth, and reproduction.

The land surface is mapped in homogeneous units based on physical characteristics significant to ungulates. The assignment of a class number to each land unit is based on known or inferred relevant information, including parent material, soil profile, depth, moisture, fertility, landform, climatic factors, and vegetation, which reflect the quality and quantity of food and cover available to wildlife. Classification is based on the natural state of the land under good practical and feasible wildlife management practices.

Capability mapping is accomplished through interpretation of air photographs and by field surveys. Location of the land, access to it, ownership, distance from cities or roads, and present condition of the land unit are not considered in assigning a capability class. Present cover and ungulate production in an area is used only as additional information. Excessive or insufficient hunting pressures do not limit the capability of the land and are not used in assigning classification values. Capability ratings are also established on the basis of the optimum vegetational stage (successional stage) that can be maintained with good wildlife management practices.

Land Capability Class Descriptions for Ungulate Wildlife

Classes

The land is divided into areas on the basis of physiographic characteristics important to ungulate populations. The degree of limitation associated with each area determined its capability class.

Class	Description
--------------	--------------------

- | | |
|---|--|
| 1 | Lands in this class have no significant limitations to the production of ungulates. |
| 2 | Lands in this class have very slight limitations to the production of ungulates. |
| 3 | Lands in this class have slight limitations to the production of ungulates. |
| 4 | Lands in this class have moderate limitations to the production of ungulates. |
| 5 | Lands in this class have moderately severe limitations to the production of ungulates. |
| 6 | Lands in this class have severe limitations to the production of ungulates. |
| 7 | Lands in this class have limitations so severe that there is no ungulate production. |

Overview Of Classification Methodology For Determining Land Capability For Waterfowl Wildlife

The mapping of land capability for waterfowl uses a national system developed with the aid of the Canadian Wildlife Service. This sector uses seven classes, like the others. Capability for waterfowl production requires a sufficient quantity and quality of food, protective cover, and space to meet the needs for survival, growth, and reproduction. The ability of the land to meet these needs is determined by the individual requirements of the species or group under consideration, the physical characteristics of the land, and those factors that influence the plant and animal communities.

The land surface is mapped in homogeneous units based on physical characteristics significant to waterfowl. A class number is assigned to each land unit based on known or inferred information on parent material, soil profile, depth, moisture, fertility, landform, climatic factors, and vegetation. Classification is based on the natural state of the land under good practical and feasible wildlife management practices. The class designation indicates the degree of limitation, the subclass indicates the factors that cause the limitation.

Capability mapping is accomplished through interpretation of air photography and by field surveys. Location of the land, access, ownership, distance from cities or roads, and present condition of the land unit are not considered in assigning a capability class. Present cover and waterfowl production on a unit are used only as additional information. Excessive or insufficient hunting pressures do not limit the capability of the land and are not used in assigning classification values.

On the above map, the large numerals indicate the classes. Where two or more large numerals are used, the following small numerals indicate the proportion of each class out of a total of 10. The letters following the large numeral indicate subclasses that apply to the class. The colours provide a convenient means of separating the various class units. The colouring relates to the single class designator or, where more than one designator is used, to the one that represents the greatest proportion of the unit.

Land Capability Class Descriptions for Waterfowl Wildlife Classes

The land is divided into areas on the basis of physiographic characteristics important to waterfowl populations. The degree of limitation associated with each area determined its capability class.

Class Description

- 1 Lands in this class have no significant limitation to the production of waterfowl.
- 2 Lands in this class have very slight limitations to the production of waterfowl.
- 3 Lands in this class have slight limitations to the production of waterfowl.
- 4 Lands in this class have moderate limitations to the production of waterfowl.
- 5 Lands in this class have moderately severe limitations to the production of waterfowl.
- 6 Lands in this class have severe limitations to the production of waterfowl.
- 7 Lands in this class have such severe limitations that almost no waterfowl are produced.

Overview Of Classification Methodology For Determining Land Capability For Forestry

The mapping of land capability for forestry is based on a national classification system comparable with the other Canada Land Inventory sectors. Land is rated according to seven classes depending on its capability to grow commercial timber in areas stocked with the optimum number and species of trees. This rating considers the land in its natural state, without improvements such as fertilization, drainage, or amelioration practices. With improved forest management, production may change and limitations may be overcome so that class changes may occur, however, significant changes will only be achieved through costly and continuing practices. The best lands for tree growth are Class 1, and Class 7 land cannot yield timber in commercial quantities, these represent the extremes, because of unsuitable climate, no Class 1 lands will be found in several regions of Canada and in certain regions, Class 2 areas will be too small to show at the chosen scales of mapping.

The capability mapping is accomplished through interpretation of air photographs and field surveys. The assignment of land units to a capability class is made on the basis of all known or inferred information about the unit, including subsoil, soil profile, depth, moisture, fertility, landform, climate, and vegetation. Associated with each capability class is a productivity range based on the mean annual increment of the best species or group of species adapted to the site at or near rotation age. Productivity classes are expressed in gross merchantable cubic foot volume to a minimum diameter of four inches. Thinnings, bark, and branch wood are not included. The productivity as expressed is that of "normal" i.e., fully stocked stands. It may be assumed that only good management would have produced stands of this nature. The following are not considered in the classification: location, access, distance to markets, size of units, ownership, present state, or special crops such as Christmas trees.

Land Capability Class Descriptions for Forestry

The classes indicate the degree of limitations for commercial forestry use. The subclasses indicate the kinds of limitations that individually or in combination with others, are affecting commercial use.

Classes

Class	Description
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| 1 | Lands having no important limitations to the growth of commercial forests. |
| 2 | Lands having very slight limitations to the growth of commercial forests. |
| 3 | Lands having slight limitations to the growth of commercial forests. |
| 4 | Lands having moderate limitations to the growth of commercial forests. |
| 5 | Lands having moderately severe limitations to the growth of commercial forests. |
| 6 | Lands having severe limitations to the growth of commercial forests. |
| 7 | Lands having severe limitations which preclude the growth of commercial forests. |