

## REPORT

### **Background**

Recommended by Northumberland's Premier-ranked Tourist Destination (PRTD) project, an opportunity exists to capitalize on the significant tourism asset of Rice Lake and to create new tourism growth opportunities for the businesses located on and around the lake. In January 2010 Northumberland Tourism in partnership with Peterborough & Kawartha Tourism facilitated a Rice Lake tourism renewal strategy process. This included sessions with public and private sector Rice Lake stakeholders resulting in an understanding of the opportunities associated with renewal of Rice Lake as a tourism asset.

PRTD consultant Richard Innes was retained to facilitate the stakeholder consultations and through the process, evaluate the findings and provide recommendations that support long-term development of the tourism assets along Rice Lake. At an industry stakeholder meeting June the findings and recommendations was presented and summarized in the report *Rice Lake Tourism Renewal Strategy Project Update/Next Steps, June 4, 2010 –Appendix A (page 4)*

Since then, the establishment of a Rice Lake Tourism Renewal working group has formed with the goal of overseeing and being accountable for the implementation of the renewal strategy.

### **Objective**

By implementing strategies that will contribute to tourism renewal and growth in and around Rice Lake, the objective is to increase the economic impact of tourism for the Rice Lake communities and for the counties of Northumberland and Peterborough.

### **Renewal Strategy**

The report proposes developing the 4 categories of tourism experience/ products found in and along Rice Lake and then focus attention on those opportunities that best match current consumer demand. Through an industry-lead Rice Lake working group

comprised of business operators, municipal and organizational representatives in partnership with Northumberland and Peterborough representatives, opportunities (below) should be prioritized, and then addressed through an implementation plan that involves all stakeholders including government, tourism organizations and industry.

### **Water-based Activities**

- Leverage the Rice Lake angling legacy and reputation and enhance offering for the new angler by adding other tourism assets, services and experiences that are relevant to this potentially new visitor and eliminate services and offerings that are no longer relevant.
- Move beyond the traditional sport fishing offering and enhance the water based experiences through experience and package development e.g. boating, paddling workshops, beaches, wakeboarding, ice skating, ice sailing

### **Land Base Activities**

- Develop more opportunities for hikers, cyclists and capitalize on the growing interest in birding and wildlife viewing e.g. interpretive programs at Rice Lake Conservation Area
- Create a “Ring Around Rice Lake” circle route which will better utilize tourism assets such as parks, conservation areas, outdoor recreation, self-guided interpretive tours. Encourage touring and extend overnight stays..
- Encourage year-round visitation such as fall/winter and create packages eg cycling, snowmobiling rental packaging

### **Arts, Culture and Heritage Activities**

- Include arts, culture and heritage to the tourism circle route concept and collaborate with supply side shareholders to expand their product and experience offering to include accommodations in workshops or other activities
- Seize the opportunity from agri-culinary tourism, leverage this e.g. offer cooking classes on “how to prepare pan fish”
- Focus attention on enhancing and promoting 4 key seasonal events e.g. Rice Lake Signature Events and use them to help enhance the fishing, outdoor recreation

## **Accommodations**

- Core to the Rice Lake experience and connects guests to the lake therefore accommodators should participate in experience enhancement workshops
- Clearly categorize the accommodation options to make purchase easier and understand current customer expectations are critical especially if there are gaps between expectations and offering e.g. upgrades at all levels may be needed.

## **Financial Implications**

This will be determined as Northumberland Tourism and Peterborough & Kawartha Tourism continue to work in partnership with the newly-formed Rice Lake Tourism Working Group and begin to prioritize the recommendations and develop an action plan for tourism development.

Recent approval from the Ministry of Tourism and Culture will help advance the efforts of this initiative.

## **Next Step**

In collaboration with the Rice Lake Tourism Renewal working group, identify short- term and long-term action plan. Encourage partnerships amongst business operators, municipal and provincial government and work towards long-term Rice Lake tourism renewal and growth.



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## **Rice Lake Tourism Renewal Strategy**

### **Project Update / Next Steps**

June 4, 2010

**Prepared by;**

**BRAIN TRUST Marketing & Communications**

## **BACKGROUND**

Northumberland Tourism and Peterborough and Kawartha Tourism initiated a Rice Lake Tourism Renewal Strategy initiative in January 2010. The shared goals at the outset of the initiative were as follows:

- Identification of a series of tangible, realistic and prioritized Rice Lake tourism renewal development initiatives validated by officials and tourism stakeholders
- Commitment from officials and stakeholders to work together to implement the initiatives
- Creation of a Rice Lake Tourism Renewal Working Group with accountability for implementation

Brain Trust Marketing & Communication was retained to design and facilitate a process to meet the identified goals.

A number of key steps were taken to get to where the initiative is at today and they included:

- Preliminary discovery conversations were held with tourism industry stakeholders and individuals who were identified to have a unique perspective on the issues and opportunities facing Rice Lake's tourism industry.
- A discovery session with "officials", individuals who had an official role and responsibility for the activities and initiatives connected to Rice Lake; including representatives from the various municipalities (staff and elected officials), Ontario Ministry's of Tourism, Environment and Natural Resources, Ontario Anglers & Hunters, Greater Peterborough Area Economic Development Corporation and Northumberland County (See Appendix A)
- Industry consultation sessions, four sessions were held on March 24<sup>th</sup> and 25<sup>th</sup> in locations on the south and north shore of the lake and included approximately 40 attendees (See Appendix B)
- An opportunity to regroup with project leads from Northumberland Tourism and Peterborough and Kawartha Tourism to discuss the information learned from the consultation sessions and to identify the next steps related to moving forward with a series of tourism development initiatives
- The consultants developed a series of high level strategies and prepared a Preliminary Findings Report, report was circulated to the officials who consulted at the outset in order to gain feedback and reaction
- A second round of industry consultation sessions were held on May 12<sup>th</sup> on both the north and south shore of the lake with approximately 40 participants (See Appendix C) to validate the observations, findings and Draft recommendations related to tourism renewal strategies for Rice Lake tourism renewal
- Industry validation (with further input and suggestions) and agreement of the observations, findings and recommendations proposed
- Agreement to form a Rice Lake Tourism Renewal Working group to partner with the proponents of the project to oversee implementation
- The preparation of the Project Update Report and Next Steps

With the identification of a series of industry validated Rice Lake tourism renewal strategies Northumberland Tourism, Peterborough and Kawartha Tourism and the consultants developed an implementation process.

## FINDINGS

Through the process identified above the consultants identified a number of findings as a result of their work. These findings were validated by the industry through round two of the consultation process and included the following:

- Tourism stakeholders identified numerous tourism assets that in their minds set Rice Lake apart from its competition
- At the same time stakeholders identified a number of challenges that they view as impediments to their ability to compete
- There is market demand for these assets based on tourism industry research (Travel Activities and Motivation Study, Ontario Ministry of Tourism, 2006)
- The tourism industry in and around Rice Lake has become fragmented and for the most part are not working together well in order to improve their competitive position in the tourism marketplace
- Recent government decisions pertaining to fishing regulations have polarized the industry
- At the outset of this process, it was unclear if there was a willingness among tourism operators to work together – with the completion of this phase of the work we can say there exists a strong desire among the industry stakeholders who participated in the project to work together to improve their competitive position in the tourism marketplace
- Consultation sessions and secondary research conducted by the consultants revealed a variety of tourism assets that exist on and around Rice Lake
- These tourism assets were evaluated based on their appeal using the Ministry of Tourism's Travel Activities and Motivations Study (TAMS)
- Rice Lake's tourism assets (supply) were compared with the travel motivators/activities (demand)
- The consultants supplemented this process with their understanding of the current tourism marketplace
- Based on this review it was concluded that from a tourism perspective Rice Lake has what the tourism market wants

More specifically:

- Fishing is the primary tourism demand generator (motivator of a trip or visit), however traditional markets where fishers have come from have dwindled, as has the number of operators
- It was apparent that in general most Rice Lake tourism operators can't compete like they once did and they continue to lose market share from their traditional fishing market, two primary reasons were attributed to this:
  - Market conditions have changed considerably - *uncontrollable*
  - Products and experiences offered have not kept pace with changing consumer expectations - *controllable*
- Based on these findings it was determined that Rice Lake had the opportunity to once again be a thriving tourism destination if its industry and tourism partners take steps to enhance and re-tool its tourism product and experience offering to meet the perceived changing dynamic of its tourism market

Utilizing the findings from Peterborough and Kawartha and Northumberland's Premier Ranked Tourist Destination projects and additional research conducted by the consultants an audit of Rice Lake's tourism products determined its tourism assets could be segmented into four tourism experience / product categories:

1. Water Based Activities
  - Sport Fishing
  - Other Water Based Recreational Activities
2. Land Based Activities
3. Arts, Culture, Heritage Experiences
4. Accommodations

Each tourism segment includes a number of attributes (supply) and a representative list is included here:

1. Water Based Activities – Sport Fishing
  - Fishing can be described as plentiful, 4 seasons, with a rich variety of edible species, having mass market appeal
  - Composition of the lake provides excellent conditions for a fish population: Panfish (perch, bluegill, sunfish and crappie), Walleye, Muskie, Large and Smallmouth Bass and Carp
  - Supply includes a collection of accommodation options that promote and offer fishing experiences to guests, complete with motor boat rentals, bait, fishing license, docking, fish cleaning facilities, and knowledgeable staff
  - There are 6 marinas, 3 public docking facilities, 4 boat shops, and 11 independent fishing guides
  - Fishing is an authentic outdoor experience with notoriety, critical acclaim and a rich and long history
  - Numerous fishing tournaments and derbies are held annually on the lake

#### Water Based Activities – Other

- A large lake, over 18 miles long, connected to the Trent-Severn Waterway, a 380 km network of waterways that connect the Bay of Quinte on Lake Ontario to Georgian Bay which is ideal for boating
- 16 resorts and businesses that offer paddling (canoe and kayak) opportunities as part of a stay or through rentals
- 2 public beaches (most resorts have a beach on-site) for swimming and water sports and recreation
- Resorts and marinas offer boat and motor rentals
- Wakeboarding competitions take place annually in Hastings
- Ice skating and ice sailing are offered at several resorts

#### 2. Land Based Activities

- Snowmobiling
  - Rice Lake Snow Drifters Club maintains local trails for snowmobiling, OFSC trails go to Bewdley, one resort offers snowmobile rentals
- ATV opportunities in the Ganaraska Forest

- Two resorts offer cross country skiing/snowshoeing opportunities
  - Most resorts have hiking/mountain biking trails nearby
  - Birding at Rice Lake Conservation Area
  - Cycling:
    - Northumberland Outdoor Adventure Map features cycling routes including Rice Lake Ramble Route, 87 km connecting Cobourg to Harwood and Gores Landing
    - Rice Lake Ramble Cycling Route, proposed signed route for summer 2010
    - Peterborough Trail Map shows safe routes leading from Peterborough to Keene, Hiawatha, Serpent Mounds, Hastings and Hall Landing
  - Conservation Areas:
    - Ferris Park Provincial Park
    - Northumberland Forest
    - Ganaraska Forest
    - Hope Mill
    - Alderville Black Oak Savanna
    - Rice Lake Conservation Area
  - Trails
    - Trans Canada Trail
    - Ganaraska Hiking Trail
    - Oak Ridges Trail
3. Arts, Culture, Heritage Experiences
- Live theatre venues - Westben Arts Festival Theatre, 4th Line Theatre
  - 17 artisans and galleries on or in close proximity to Rice Lake
  - National Historic Sites
    - Whalen's Fine Art & Framing , Keene
    - Serpent Mounds (closed for renovations until 2011)
    - Trent-Severn National Historic Site
  - Lang Pioneer Village
  - Roseneath Carousel
  - Aboriginal experiences
    - Hope Mill
    - Annual Alderville First Nations Pow Wow
    - Serpent Mounds - Hiawatha First Nations
    - Annual Hiawatha First Nation Pow Wow
    - Rice Lake Spirit Walks – Alderville
    - Monthly Drum Socials
  - 20 annual festivals and events
4. Accommodations
- 44 lakeside cottages, resorts, bed & breakfasts
  - 9 campgrounds and RV parks

With the segmentation of Rice Lake's tourism assets complete a series of high level opportunities were identified in order to begin to understand and appreciate the tourism renewal potential for tourism operators located on and around Rice Lake.

It became apparent one overarching opportunity that applied to all product and experience segments was present. This opportunity potentially could become a cornerstone strategy for tourism renewal. **Enhancing the overall positioning of Rice Lake** is viewed as fundamental to tourism renewal. *Positioning* from a perspective of the internal attitude and approach by industry stakeholders to tourism renewal as well as external positioning from a marketing perspective may be paramount. The assumption is that Rice Lake already enjoys high levels of awareness among certain visitors. However that level of awareness is directly connected to tourism products and experiences that may have disappeared or changed in recent years. For this reason enhancing the positioning is required. In addition there exists new tourism attributes that are not on the awareness radar of most potential visitors. Therefore establishing new positioning is also warranted.

The balance of opportunities by product and experience segment is as follows:

### **Water Based Activities – Sport Fishing**

- Leverage the Rice Lake angling legacy and reputation
- Enhance positioning for a “new Ontario based angler”
- Identify the characteristics and expectations of the new angler – *Research required*
- Re-tool fishing / accommodations operations to meet expectations – *Enhancements to supply required*
- Educate the new angler on techniques and responsible fishing practices
- Leverage the new opportunities that come with the winter fishery – this is a potential growth asset and opportunity
- With understanding of the “new angler” equip the industry to service this new market segment through education sessions
- Conduct industry/peer led workshops to facilitate understanding of the new customer
- Use “best practices” from existing operators to shape the enhancements
- Expand the experience offering to include “other” tourism assets
- Add services and experiences that are relevant to this potentially new visitor and eliminate services and offerings that are no longer relevant

### **Water Based – Other**

- Move beyond traditional “sport fishing” positioning
- Leverage market demand to be “lakeside” - *“Be Lakeside on Rice Lake”*
- Identify the characteristics and expectations of the urban traveller – *Research required*
- Re-tool the tourism offering to meet these expectations
- Enhance the water based experiences through experience and package development

### **Land Based Activities**

- This is an underdeveloped asset especially for hikers and cyclists
- Leverage snowmobiling day trippers into overnight guests through packaging and increasing the accommodation options
- Capitalize on growing interest in birding and wildlife viewing
  - Introduction of interpretive programs where accommodation based guides would enhance marketability of this asset
- Create the “Ring Around Rice Lake” tourism circle route and tour
  - Feature a variety of stops along the way

- Feature outdoor recreational opportunities
- Better utilize the parks and conservation areas
- Accommodators can pool resources to hire guides
- Include a self guided interpretive component
- Perfect for auto, cycle, motorcycle, snowmobile, hiking

### **Arts, Culture and Heritage Activities**

- Leverage “Ring Around Rice Lake” tourism circle route concept and add an Arts, Culture, Heritage component
- Foster collaboration among supply side shareholders, educate and inform them to expand their product and experience offering and include accommodators
  - Experience development workshops
  - Packaging workshops
  - Travel Trade workshops (motor coach market)
- Better leverage Northumberland's, Peterborough's culture development and marketing activities
- Focus attention on enhancing and promoting four key seasonal events – these become Rice Lake’s *“Signature Events”*
  - Use them to help enhance the positioning of Rice Lake:
    - Fishing, Outdoor Recreation, Arts/Culture/Heritage
  - Events drive visitation seasonally and geographically
  - There are 20+ events to choose from
  - Secondary events piggy back on the exposure from the Signature Events
- Seize the “apparent” opportunity from agri-culinary tourism, better understand how to leverage this asset
  - Learn from other destinations
  - Locally grown becomes cornerstone of the food and beverage offering
  - Offer “how to prepare pan fish” classes

### **Accommodations**

- Accommodations are core to a Rice Lake experience, accommodators “connect” guests to the lake therefore better connect guests to broader tourism experiences, accommodators should participate in experience enhancement workshops
- A wide variety of accommodation options exist – type, price, location
- Clearly categorize the accommodation options to make purchase easier
- Understanding of current customer expectations critical
- Suspect there is a gap between expectations and offering
- Upgrades at all levels may be needed
- Collaborate with governments and industry to identify sources of enhancement capital dollars

## **RECOMMENDATIONS**

1. Establish the Rice Lake Tourism Renewal Working Group
  - Work in partnership with the Rice Lake Tourism Association and their leadership
  - Engage a representative collection of tourism industry leaders
  - Establish the mandate for this industry led initiative
2. Allocate resources (human and financial) to facilitate the process
  - This could be a perfect destination development project for the new Regional Tourism Organization
3. Overarching goal of Rice Lake tourism renewal plans is to enhance the positioning of Rice Lake
4. Conduct necessary market research to understand the expectations of the urban traveler
  - Identify the scope of the research and get it in market as soon as possible, no later than fall 2010
5. Concurrently begin to prioritize the opportunities identified in the Rice Lake Tourism Renewal Strategy
  - This becomes the first role for the working group
  - Identify an implementation plan that involves all stakeholders including governments, DMO's and industry
6. Focus attention on those opportunities that best match consumer demand and don't lose site of identified core tourism assets
  - Water-based Activities
  - Land-based Activities
  - Arts, Culture, Heritage Experiences
  - Accommodations

## **NEXT STEPS**

- Identify a small group of industry leaders who would form the core of a soon to be expanded working group
- Meet with this core group of leaders on June 28 (proposed date) to discuss the working group concept and a potential mandate
- Formalize the working group by adding representatives and establish a schedule of working meetings beginning in summer 2010
- Seek funding from the RTO to begin implantation of the Rice Lake Tourism Renewal Strategy, implementation to begin in September 2010