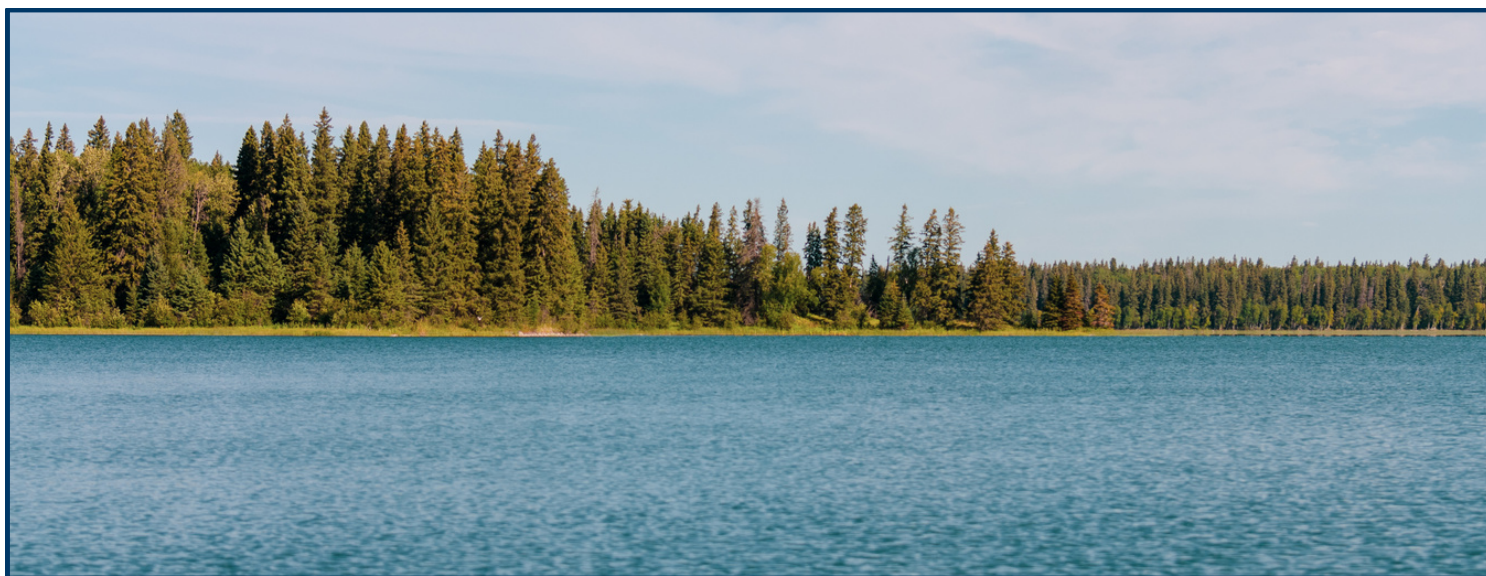




Accommodations in Manitoba:

Assessing the Role and Impacts of Accommodations in the Rural and Remote Tourism Sector of Manitoba

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Executive Summary

From May to September (2024), a senior researcher from the Rural Development Institute worked to conduct the *Accommodations in Manitoba* Research Project. This project focused on exploring the nuances of rural and remote tourism across south western Manitoba, with a specific focus in the role of accommodations within these communities.

**Participating
Communities Include:**
Brandon, Dauphin, Falcon
Lake & the Whiteshell,
Onanole, Russell, and
Winkler.

To capture place-specific nuances, Key Informant (KI) Interviews were conducted with local stakeholders working within the tourism sector across six rural and remote communities. In total, 14 interviews were conducted - seven with accommodation General Managers (GMs), and six with community stakeholders working in the tourism sector. In addition to these interviews, participating accommodation GMs were requested to administer written surveys to accommodation guests between the months of May and September (2024), providing insight into the motivation of travelers and their experience within community. The following report outlines the key findings identified from both KI interviews and written survey participants.

KEY FINDINGS

- 1. Collaboration and Communication Gaps:** There is a dichotomy between how accommodation GMs and community stakeholders perceive collaboration and communication in community. These communication gaps may hinder overall tourism development strategies and must be addressed collaboratively at the local level.
- 2. Marketing Challenges and Capacity Limitations:** While there is some level of collaboration between community stakeholders and tourism agencies, many KIs noted the high cost of professional marketing services limits these collaborative efforts. As a result, both accommodation GMs and community stakeholders often rely on self-directed digital marketing using social media, which may be less effective due to the complexity of building and maintaining a target audience. To foster the rural tourism industry, considerations should be made on how to best support these stakeholders within a marketing capacity.
- 3. Tourism Infrastructure and Seasonal Strain:** Accommodation GMs and community stakeholders indicated a need for enhanced seasonal capacity to meet high-season demand - this includes accommodations for seasonal workers. Additionally, while businesses and accommodations located within/ near provincial and national parks are a significant draw for overnight guests in Manitoba, they face unique challenges in terms of accessing financial supports, limiting their ability to continue fostering the local tourism sector.

This project highlighted structural and operational barriers rural and remote communities face with regard to tourism in Manitoba. To move forward, coordinated support from tourism agencies and inclusive community collaboration strategies are essential for sustainable tourism growth in these regions.



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1.0 Background & Introduction

Accommodation establishments within rural and remote communities are fundamental in fostering the growth and development of the local tourism industry. The ability for communities to attract and host overnight guests, as well as host events within community, offers an opportunity to stimulate the local economy (Dwyer and Wickens, 2013). This is because as travelers visit new towns, they are likely to purchase local goods from shops and vendors, as well as pay for local services - such as the accommodations themselves, gas from local stations, and food from local restaurants. Typically, major centres such as Winnipeg and Churchill have driven the provincial tourism economy in Manitoba, giving shape to future opportunities for tourism growth (Phillips and Castle, 2022). However, since the COVID-19 pandemic, there have been significant marketing strategies to foster the growth of tourism in rural and remote communities (see Travel Manitoba, 2021; Tourism Winnipeg, 2021; MNP, 2022; Singhania et al., 2022; Manitoba Natural Resources and Northern Development, 2023).

However, rural and remote communities face specific barriers and challenges when working to build on local tourism, as urban centres are more likely to access financial resources, and/or have pre-established infrastructure to support and influx of travelers (Phillips and Castle, 2022; Singhania et al., 2022). In order to foster the growth of tourism industries in rural and remote spaces (and stimulate the local economies therein), there must be an understanding of the strengths and barriers local stakeholders are facing. While it has been proposed that the vast majority of tourism research focuses on local economies (see Pulido-Fernandez and Cardenas-Garcia, 2020; Singhania et al., 2022; Fresnoza, Balcombe and Choo, 2024), the findings of this project highlight the importance of a more holistic approach when conducting tourism research and how understanding place-specific contexts can be used to foster community and achieve overall equity within the tourism sector.

1.1 Community Context

The six participating communities maintain unique contexts - both geographically and structurally. Table 1 includes both demographic and tourism sector data representative of Brandon, Dauphin, Falcon Lake and the Whiteshell, Onanole, Russell, and Winkler (see Figure 1). All data was retrieved from the Community Census Profiles from Statistics Canada (2021); industry data from the Rural Manitoba Economic Development Corporation (RMED) Regional Profiles; and tourism sector labor market data from Travel Manitoba.

These data demonstrate that while there is a significant number of jobs and businesses to support travelers with regard to accommodation and hospitality, there are approximately half the number of jobs and businesses to support recreation, entertainment and the arts sector - activities which travelers could engage in during their stays across Manitoba. This highlights an important context, as Key Informants and survey participants note interest in enhancing local recreation to support local tourism.

Figure 1. Manitoba & Participating Communities



Table 1. Demographic and Tourism Sector Data

Community*	Population	Jobs in Accommodation/ Food Services Sector (By Region)		Jobs in the Recreation, Entertainment & the Arts Sector (By Region)	
		% of Jobs	# of Businesses	% of Jobs	# of Businesses
Brandon	51, 313				
Russell	2, 596	7% (3, 624 total jobs)	330	2% (934 total jobs)	150
Onanole	1, 852				
Dauphin	8, 368	7% (1, 040 total jobs)	131	2% (323 total jobs)	53
Falcon Lake & The Whiteshell	383	6% (2, 293 total jobs)	251	2% (827 total jobs)	138
Winkler	13, 745	5% (1, 499 total jobs)	151	1% (385 total jobs)	78

*The data provided in this figure represents census data from the Census Divisions (CD) of Manitoba: Brandon, Russell and Onanole are located in the Southwestern CD; Dauphin is located in the Parkland CD; Falcon Lake and the Whiteshell are located in the Southwest CD; Winkler is located in the Southcentral CD.

2.0 Accommodation Guest Survey Data

All overnight guest surveys were administered between May 20 and September 20 (2024). It was indicated that accommodation GMs were to administer one survey per person (or group) checking into their establishment for two, two-week periods throughout the months of May and September (the high-season for travelers in Manitoba). The accommodation GMs were responsible for sharing the surveys with front desk staff for distribution, as well as determining when the best time to administer these surveys was based on events and activities taking place within community throughout the summer months.

In total, 2, 000 written surveys were prepared for distribution to overnight guests at six of the seven participating accommodation establishments (see Table 2). As one of the seven accommodation Key Informant (KI) already conducts personal guest surveys for their location, they did not agree to administering the project surveys to overnight guests at their establishment. In total, 88 written surveys were completed and returned to accommodation staff upon check-out. This exemplifies a 4.4% written survey response rate. However, this response rate is based on the total number of surveys provided to accommodation KIs to be administered, not the total number of surveys that were actually administered - which was unattainable data due to various staff members engaging in the administration of accommodation guest surveys.

Overall, the accommodation in Onanole had the highest response rate with 29 surveys completed and submitted for analysis, and the accommodation in Brandon had the lowest response rate with 0 completed surveys submitted for analysis. Section 2.1 of this report outlines key findings from the accommodation guest survey data, reflective of each participating community.

Table 2. Survey Administration & Response Rate by Community

Community	Surveys Provided	Surveys Submitted	Response Rate
Brandon	500	0	0
Dauphin	100	9	9%
Falcon Lake and the Whiteshell	100	6	6%
Onanole	100	29	29%
Russell	1000	38	4%
Winkler	100	6	6%

2.1 Dauphin, MB

Accommodation Guest Survey Data

9 Total Survey Participants

Of total 11 travelers (including respondents)...

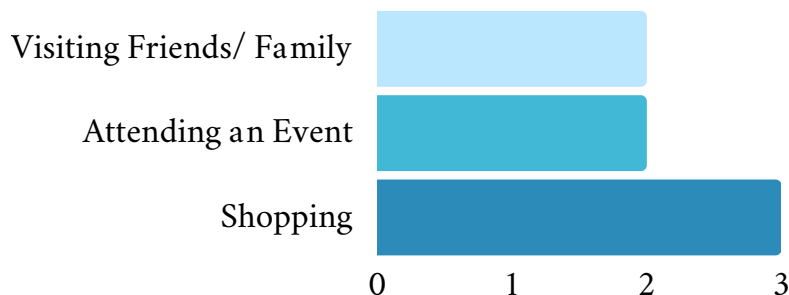
6 Male

5 Female

For 55% of respondents, this was their first time staying in Dauphin, Manitoba



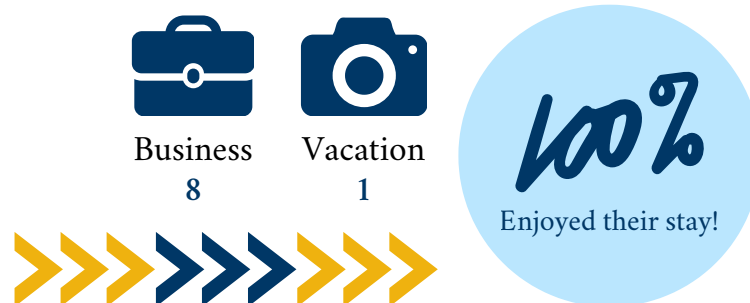
What Activities are Travelers Engaging in?



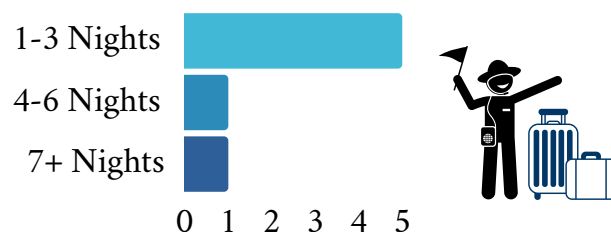
When comparing the general amount of time traveling in Manitoba from 2021 to 2023....



Why are Visitors Traveling?



How Long were Guests Staying?



Let's Talk Capacity

6/9 respondents believed Dauphin needed more capacity to build on local tourism

1/9 respondents believed Dauphin needed more hotel capacity

[Dauphin needs] more after hour activities

Respondent 80

Dauphin needs more variety in jobs and infrastructure

Respondent 81

When it Comes to Municipal Accommodation Taxes

1/9 respondents indicated they knew what Municipal Accommodation Taxes were

3/9 respondents indicated they would like to know more about Municipal Accommodation Taxes



2.2 Falcon Lake & The Whiteshell

Accommodation Guest Survey Data

6

Total Survey Participants

Of total 20 travelers (including respondents)...

9 Male

11 Female

All respondents, were returning guests to the Falcon Lake & Whiteshell region

[We have] vacationed here for many years

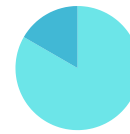
Respondent 5

What Activities are Travelers Engaging in?

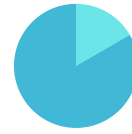


Kayaking, canoeing, swimming, camping & hiking

When comparing the general amount of time traveling in Manitoba from 2021 to 2023....



Respondents traveled the same amount



Respondents traveled more

Why are Visitors Traveling?

100% Vacation

I come here because it's away from dense population & [i can be] immersed in nature, ecology, run space. We need more places to spend like this and yet more means less nature for nature. Tax \$ from this source should be spent to encourage tourist funded businesses [to] GREEN UP!

Respondent 3



How Long were Guests Staying?

1-3 Nights

4-6 Nights

7+ Nights

0 1 2 3



Capacity Content

There were no comments regarding the capacity of the community or the hotel, but there were thoughts on "development"



I'm less likely to come if it gets more developed... Winnipeg might need more hotel spaces but the White shell should not be more developed - it's a park

Respondent 1

When it Comes to Municipal Accommodation Taxes

2/6 respondents indicated they knew what Municipal Accommodation Taxes were

1/6 respondents indicated they would like to know more about Municipal Accommodation Taxes



2.3 Onanole, MB

Accommodation Guest Survey Data

29 Total Survey Participants

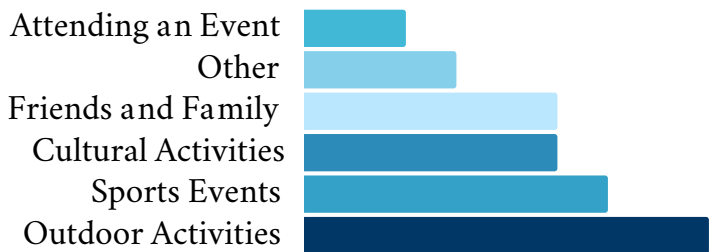
Of total 41 travelers (including respondents)...

13 Male

28 Female

For 11/29 respondents, this was their first time staying in Onanole, Manitoba

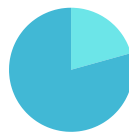
What Activities are Travelers Engaging in?



Hiking & biking



When comparing the general amount of time traveling in Manitoba from 2021 to 2023....



Respondents traveled less



Respondents traveled the same amount



Respondents traveled more

Why are Visitors Traveling?



Vacation
12



Leisure
11



Other
4

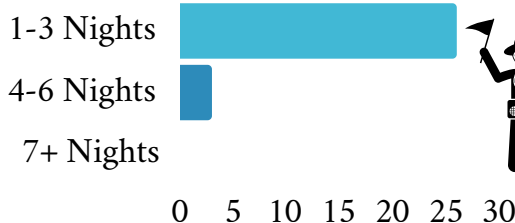


Business
2

I enjoyed talking with [accommodation] employees and I liked the vibe at Poor Michael's Emporium

Respondent 72

How Long were Guests Staying?



Let's Talk Capacity

17/29 respondents believed Onanole needed more capacity to build on local tourism, as well as more accommodation capacity

Discounted Park Pass Rates, local trolley to go into town

Respondent 62

Responses and requests such as these may seem connected to 'community capacity,' but it's more complicated than that!

This highlights a disconnection between those working within the world of community development and the public sector.

When it Comes to Municipal Accommodation Taxes

7/29 respondents indicated they knew what Municipal Accommodation Taxes were

4/29 respondents indicated they would like to know more about Municipal Accommodation Taxes



100%

Enjoyed their stay!

2.4 Russell, MB

Accommodation Guest Survey Data

38 Total Survey Participants

Of total 59 travelers (including respondents)...

26 Male

33 Female

For 15/29 respondents, this was their first time staying in Russell, Manitoba

I like that everything is within walking distance (store, Timmies, etc.)

Respondent 43

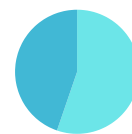
What Activities are Travelers Engaging in?



When comparing the general amount of time traveling in Manitoba from 2021 to 2023....



Respondents traveled less



Respondents traveled the same amount



Respondents traveled more

Why are Visitors Traveling?



Vacation
4



Leisure
7



Passing Through
8



Other
10



Business
17

How Long were Guests Staying?



Wonderful people! Kind & hardworking - esp the Sugar Shack owner / operator

Respondent 33

Let's Talk Capacity

18/38 respondents believed Russell needed more capacity to build on local tourism

14/38 respondents believed Russell needed more hotel capacity



When it Comes to Municipal Accommodation Taxes

13/38 respondents indicated they knew what Municipal Accommodation Taxes were, and 4 respondents indicated this knowledge did influence their accommodation choice

6/38 respondents indicated they would like to know more about Municipal Accommodation Taxes

2.5 Winkler, MB

Accommodation Guest Survey Data

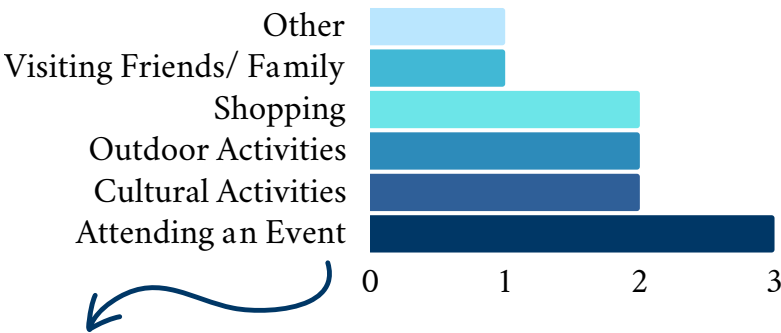
6 Total Survey Participants

Of total 13 travelers (including respondents)...



For 2/6 Participants, this was their first time staying in Winkler, Manitoba

What Activities are Travelers Engaging in?



Manitoba Stampede, Softball Tournament, Training Session for Work, and a Funeral

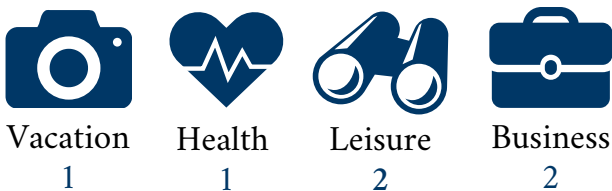
One traveler specifically noted their interest in traveling to the area to see the Morden Fossil Discovery Centre



When comparing the general amount of time traveling in Manitoba from 2021 to 2023....

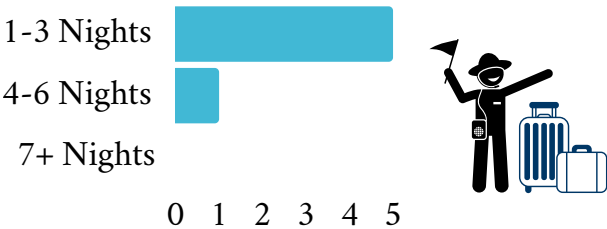


Why are Visitors Traveling?



[Traveling] just to get out of the city
Respondent 47

How Long were Guests Staying?



100%
Enjoyed their stay!

Let's Talk Capacity

2/6 respondents believed Winkler needed more capacity to build on local tourism
3/6 respondents believed Winkler needed more hotel capacity



When it Comes to Municipal Accommodation Taxes

2/6 respondents indicated they knew what Municipal Accommodation Taxes were, but it did not influence their accommodation choice

2.6 Survey Data: Key Findings

While the data collected from the accommodation guest surveys is reflective of the experiences, interests and motivations of travelers, it cannot fully represent what interests and motivations of all travelers throughout western Manitoba (Cunha et al., 2021; Smith, 2016). Each circumstance of travel is unique, and may vary greatly participant by participant - therefore, the provided data cannot be used to represent all travelers as one homogenous group (Smith, 2016; Durberry, 2018). Rather, the following highlights key findings from all accommodation guest survey data, with a specific focus in activities and motivations, patterns since the COVID-19 pandemic, and perceptions on community capacity.

2.6.1 Why Guests Travel

Overall, the majority of travelers (29 survey participants) indicated they were staying overnight in community for business and work. 24 participants indicated they were traveling for vacation, and 20 were leisurely traveling - "just to get out of the city." 8 participants indicated they were traveling through community on their way to another destination, and 15 were traveling for other reasons.

While most travelers indicated work tasks and business were their main motivation for travel, when asked about what activities they would be engaging in during their stay, 28 participants noted they would be spending time outside, and doing outdoor activities - such as hiking, biking, going to the beach, and so on (see Table 3). This was closely followed with 25 participants indicating they planned to spend time with friends and family (see Table 3).

Table 3. Activities Travelers are Engaging In During their Stay in Community

Community	Activities						
	Outdoor Activities	Visiting Friends and Family	Shopping	Attend an Event	Other	Cultural Events	Sporting Events
Dauphin	0	2	3	2	0	0	0
Falcon Lake and the Whiteshell	6	2	3	0	0	0	0
Onanole	8	5	0	2	3	5	6
Russell	12	15	9	6	7	3	0
Winkler	2	1	2	3	1	2	0
Total	28	25	17	13	11	10	6

This finding in terms of outdoor activities is not surprising, as during the COVID-19 Pandemic, Travel Manitoba reinforced the value and importance of connecting to nature through the utilization of local trail routes (Travel Manitoba, 2021). This major marketing strategy was in part designed to ensure sustained rates of domestic travel within and across the province continue today, as Trail Tourism and Promotion was identified as the Fourth Pillar in the 2023 Strategy and Action Plan (see Manitoba Natural Resources and Northern Development, 2023). The value of the extensive trail routes - land and water alike - is additionally reflected in the KI interviews, where 5 accommodation stakeholders identified their connection and vicinity to nature and/ or green spaces as a community asset.

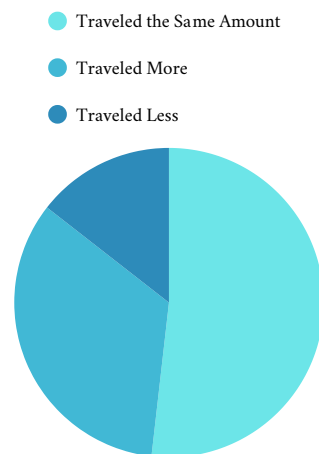
When asked about the time in which they will spend within community, 70 of the 88 participants indicated that they would only be staying within the accommodation for 1-3 nights. This was followed by 11 participants staying 4-6 nights, and only 4 participants staying 7+ nights. It is noteworthy that three of the four guests staying overnight for 7+ nights were staying within the region of Falcon Lake and the National Whiteshell Park, the other staying in Dauphin. This demonstrates that while the vast majority of participants are staying within smaller communities for short periods of times, those staying in and near the National and Provincial Parks are staying for extended periods of time.

2.6.2 Rates of Travel in Manitoba: 2021 vs. 2023

Survey participants were asked to reflect on the how their rates of travel within Manitoba differed between 2021 - when the travel restrictions were still implemented throughout Canada - and 2023. In total, 43 participants indicated that they traveled about the same amount in both years, 28 indicated they traveled more in 2023, and 12 indicated they traveled less in 2023 (see Figure 2).

During the COVID-19 Pandemic, Manitobans were encouraged to explore their own backyard, and continue pursuing provincial travel - the goal being to sustain the tourism sector for rural and remote communities as well as promote well-being (Avraham, 2021; Travel Manitoba, 2021). As there was a significant, worldwide drop in tourism visitation in urban centres (Rayaonson and Tanguay, 2022), marketing strategies focused on sharing the strengths of rural and remote communities, as well as reinforcing the notion that experiential tourism could continue for residents across the province. This 'image repair' marketing strategy was exemplified through the work of Avraham (2021), where enhancing the call for increased national visitation was a patterned response to sustain local tourism (also see Rajaonson and Tanguay, 2022). Countries are still facing impacts of over tourism due to the increased number of individuals seeking to engage in out-of-country travel, but Manitoba has continued fostering interest in provincial

Figure 2. Travel Patterns in Manitoba: 2021-2023



travel for Manitobans. As domestic travelers provided \$992.9 million in revenue to the Canadian tourism economy in 2019, this comes as no surprise (Travel Manitoba, 2021).

2.6.3 Community Capacity & Municipal Accommodation Taxes

Overall, 43 participants indicated that they believed communities needed more capacity to build on local tourism. Elaborated responses included requests to enhance the number and diversity of activities that can be done within community, as well as enhance current infrastructure. However, many participants indicated the question confused them, and that they were not sure what was meant by ‘capacity.’ This confusion also resulted in participant requests that cannot be conducted at the local level to foster the tourist experience. For example, one participant staying overnight in Onanole indicated they would like to see a reduced fee for Parks parking passes. This request cannot be addressed by the community, as parking passes and transportation fees are put in place at the provincial and federal level.

These responses highlight the importance of clear and transparent language. Generally speaking, the term ‘capacity’ can be reflective of a variety of contexts - so while this terminology may be clear for community practitioners and researchers conducting specific work, the term may not translate to the public. For example, participants staying in and near the National and Provincial parks perceived ‘capacity’ to mean ‘development.’ In these cases, two specific participants indicated that they would not like to see an ‘increase in capacity,’ as they would be less interested in staying within community if there was ‘more development.’

Survey participants also indicated that there is interest exploring rural and remote spaces for the sake of vacation and leisure, but they would like to engage communities that offer more activities. However, rural and remote communities are often reliant on volunteers to provide these experiences and activities - whether by proposing community development projects, engaging in project-focused fundraising, organizing the development of new infrastructure, etc. (Singhania et al., 2022). Multiple KIs indicated that the volunteerism in community has declined since the COVID-19 pandemic. Therefore, to support the tourism sector in rural and remote Manitoba, there must be considerations into how larger organizations and agencies can effectively support rural development projects alongside community members.

While Municipal Accommodation Taxes (MATs) do offer an opportunity for communities to stimulate economies for community development projects, the by-law is not suitable for rural and remote communities (see Breedon, 2025). This is in part due to intermarket competition with nearby communities (Breedon, 2025; Lee, 2014; Alfano et al., 2022). Overall, only 25 of the 88 survey participants indicated they knew what MATs were and how they were implemented at the municipal level, and 14 participants indicated they wanted to know more. This lack of transparency and awareness on what MATs are and how they can benefit community highlights a need for further communication with communities.

3.0 Key Findings: Key Informant Interviews

The research team believed that in order to capture the rural and remote community realities, conversations should be had with two distinct groups of stakeholders working within the tourism sector - stakeholders being individuals who can influence, or are affected by, the success of local tourism (Dwyer & Wickens, 2013). Their unique perspectives and insights of community life are based on their positionality and experiences, and due to these valuable community insights, we recognize stakeholders participating in this project as “Key Informants” (KIs). These two groups of KIs included accommodation General Managers (GMs), as well community stakeholders (i.e., Tourism Agency Staff and Coordinators, Mayors, Economic Developers, members from local Chamber of Commerce).

In total, 14 participants from 6 different communities (Brandon, Dauphin, Falcon Lake & the Whiteshell, Onanole, Russell and Winkler) agreed to participate in this project. Their participation included engaging in KI interviews, where stakeholders were asked set questions regarding tourism within their respective communities. Seven interviews were conducted with accommodation GMs and six were conducted with community stakeholders between the months of May and August (2024).

3.1 COLLABORATION AND COMMUNICATION

Interestingly, when asked about collaboration within community, six accommodation KIs and one community KI indicated there was effective collaboration. In contrast, one accommodation KI and five community KIs indicated that there was partial collaboration within community, where stakeholders experienced disconnection and inconsistencies in collaboration. These two opposing perceptions offer an important insight into the ways positionality impacts those working within the tourism sector in rural and remote communities. For example, because accommodation establishments are responsible for hosting overnight guests and providing event space for activities, they are fundamentally more aware of the different events taking place in community throughout the year.

The majority of responses regarding collaboration were related to communication, and how lack of communication can hinder collective destination marketing. While the majority of accommodation GMs indicated they work with local organizations, businesses, and local tourism agencies to support marketing needs, community KIs indicated less collaboration with these third parties (see Table 4). This perception of disconnection was also reflected in the responses from one accommodation KIs and two community KIs, where they indicated that the community lacks alignment in terms of implementing local tourism strategies. With this, it can be inferred that many businesses and organizations must independently acquire updates on community events and activities, as well as advertise their efforts in the tourism sector. Rather, there is no focal point for collaboration to strategize efforts in the local tourism sector.

One Community Stakeholder specifically indicated the lack of communication can at times result in logistical issues – whereby local organizations working independently from one another double-book events in community, resulting in business owners not being able to schedule effectively for the influx of guests.

We could do a better job. The lines of communication are open, but we could all do a better job to make sure that the message we want going out there is more uniform and consistent, I think.

Accommodation Key Informant

None of us are on the same page.

Community Key Informant

3.2 MARKETING AND CAPACITY LIMITATIONS

When KIs were asked about capacity, marketing was a major point of discussion. While collaboration with local organizations, as well as tourism associations and agencies, were described, there was little indication on who was engaging with whom to facilitate this collaboration. As capacity is a significant factor influencing the ability to achieve success in any development strategy, it is important to understand where support is being provided to the rural and remote tourism sector – or rather, where efforts to support these tourism sectors can be enhanced.

When asked how KIs engage in marketing, the most common response for both groups of KIs was to work with other community organizations to cross-advertise events through their individual platforms and accounts. For four accommodation KIs and three community KIs, the main marketing strategy implemented through establishments was digital marketing via self-directed social media platforms (see Table 4). Six KIs indicated that accessing marketing supports - in addition to managing their independent social media platforms - was a challenge due to the high costs affiliated with marketing services. One KI went so far as to say it didn't make sense for them to invest in these supports (i.e., having advertisements included in tourism brochures and travel guides) when they can market themselves. While digital marketing typically offers a free platform for local communities to market their communities as destinations, building a target audience can be a complex process. During the COVID-19 Pandemic, Travel Manitoba launched the “No Cost Partnership” strategy, whereby communities could receive marketing support from Travel Manitoba to enhance the awareness of local destinations for Manitobans and Canadians alike (Tourism Winnipeg, 2021). While these collaborations did support many communities and affiliated establishments, local stakeholders were unable to continue these collaborations due to the reenacted marketing fees following the pandemic. If there is interest in seeing the growth of local tourism sectors in rural and remote communities, agencies and associations with marketing capacity should consider the development of sustainable and affordable marketing supports.

Table 4. KI-Implemented Marketing Strategies

Question	Responses	Accommodation Sector KI (n=7)	Community Stakeholder KI (n=6)
How do you engage in marketing	Working with local organizations and businesses (i.e., Chamber of Commerce) to support marketing needs share advertisements		
	Engage in digital marketing (i.e., social media platforms)		
	Working with tourism agencies and associations to support marketing needs		
	Smaller scale marketing strategies (i.e., local publications and community calendars, website management, word of moth marketing, collaborate with tourism associations)		

We would all love to be featured by [tourism agencies and organizations], but nobody's got 5 grand to throw at you every two months. And that's just it. It's that the *consecutive* flow of cash that needs to come in order to have that the regular production of materials...

Community Key Informant

Before we throw any massive amounts of money anywhere we need to have a sit down with the local stakeholders and have the conversation about what the struggles are... Just to get a line. Recognize that we do have a problem, and that problem is that we don't have a leisure market. There's not much keeping people for leisure reasons. Even our local festival... So I think as a community we need to have a frank conversation about what's changed and how can we get a little more aligned to see this come back.

Accommodation Key Informant



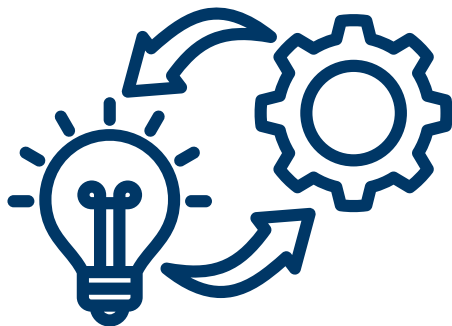
While KIs indicated the importance of new marketing strategies, each KI indicated a different area to focus these efforts (see Table 5). One KI indicated that in addition to marketing events (as they were a self-proclaimed events-based town), they need to ensure the day-to-day and leisure activities by marketing established assets - such as businesses and infrastructure - that can provide travelers with a positive experience during their overnight stays. They also specifically expressed the importance of marketing their communities to families. Similarly, one KI also indicated that the community needs to focus marketing efforts that would break the seasonal traveler patterns to ensure annual visitation.

As discussed in Section 2.6.3, volunteers are a cornerstone for community activities and events. Three KIs indicated that since the COVID-19 pandemic, their communities have seen a decrease in the number of volunteers contributing to these efforts. This change in overall participation has significant impacts on community in terms of building the local tourism sector - as it increases the workload for the few community members who are working to contribute to events-based tourism. In addition to requesting external supports for event development, one challenge communities are facing is to build interest in local volunteerism while avoiding contributions to feelings of local burn out (as described by an accommodation KI).

Somewhat I wouldn't say that there's a strong, strong effort there our community... we don't have, like, an active officer. Everything in this community that's community-based is volunteer run. So, [for] our chambers, all volunteers are doctors, officers, local fire department, sports club, community club - all volunteers. So there's often, like, you know, our marketing organization. Same thing... So there's an there's an effort, but it's not very strong...

Community Key Informant

Of the 13 KIs, all participants indicated that their communities need more capacity to build on local tourism. However, the responses with regard to building capacity were variable (see Table 5). There was no 'right answer' in terms of next steps, or potential strategies that could foster these developments. When KIs were asked what their community needed to make it a more desirable destination, there was no consensus on what would serve their community best (see Table 5). So while each community requires a tailored plan based on place-specific strengths, there was no consistency in terms of a collective understanding on specific community needs.



When asked if communities needed more accommodation capacity, responses varied. Three accommodation GMs indicated there is no need to build accommodation capacity, due to the fact that the accommodations within their communities already face challenges in sustaining occupancy rates throughout the year. However, three accommodation KIs and four community KIs indicated that there is a need to enhance accommodation capacity on a *seasonal basis*.

Table 5. Building Local Tourism Capacity

Question	Responses	Accommodation Sector KI (n=7)	Community Stakeholder KI (n=6)
How do you think community can build capacity in local tourism (Examples Provided)	Collaborate with other stakeholders to strategically align goals and activities, and work to access government financial supports		
	Work as a community to make the destination centre more attractive to travelers (i.e., provide unique services, enhance current businesses, collaborate to host unique events, etc.)		
	Enhance infrastructure for accommodations and community		
	Focus efforts on events-based tourism (i.e., book larger events, focus on enhancing event spaces); promote collaboration; market community for families; share economic impacts of tourism with community to build interest		



3.3 TOURISM INFRASTRUCTURE AND HIGH-SEASON CHALLENGES

Key Informants noted that while accommodations may not be able to sustain consistent occupancy throughout the year, they are incredibly popular on a seasonal basis. As with most travel destinations, rural and remote communities face fluctuating rates of traveler visitation throughout the year. This is especially true for locations in and near the Provincial and National Parks (i.e., Onanole and Falcon Lake); and locations who rely on events-based tourism.

3.3.1 Nature-Based Tourism and High Season in the Parks

It came as no surprise that proximity and access to natural spaces and the outdoors was identified as an asset by five accommodation GMs. As the National and Provincial Parks in Canada continue to draw tourists at the provincial, national and international level, it is important to recognize the role these regions have in driving local visitation. However, these regions face unique barriers in terms of accessing government support. Though local residents and business owners within these regions work collectively to support one another *as a community*, they are not recognized - or distinguished as - a 'municipality' in the eyes of the government. This distinction (or lack there of) is incredibly important, because without the 'municipality' title, local business owners are not deemed eligible to apply for specific grants and funding streams that are designed to support the growth of local tourism. One community KI expressed that in addition to these barriers in funding access, these locations are faced with coordinating the certification of regulated business standards that would typically be organized by a municipal staff members (e.g., conducting regular water quality assessments). So while businesses in these regions are arguably making the most impact in terms of stimulating local economies, they maintain the most disadvantaged positionalities. These reduced supports also impact the ability to secure a workforce for the high-season.

I would love to extend the parks, and the government says “we want to see expansion.” ... [but] no [businesses] would ever make their money back with what we would have to go through - with environment, and parks, and permits... It would take a hundred years to make back your money. So no one, no one will expend, because no one can afford to do it... [the government is] not offering money [or support] to help build.

Community Key Informant

I would like to see our government set out clear expectations with their regulatory people... and educate. Say, “this is what you need done,” and then show [the communities] how... the culture of that would change our lives for the better.

Community Key Informant



Key Informants located in and around the National and Provincial Parks face increasingly problematic barriers in supporting seasonal travelers. KIs from these regions indicated that travelers are typically more inclined to stay in their locations during the spring and summer months. While there are travelers who enjoy outdoor winter activities (i.e., skiing, snowmobiling, ice fishing, etc.), accommodation establishments still see still lower - and more variable - occupancy rates during the winter months. This was affiliated with both disinterest in winter travel, and the risks of reservation cancelation due to winter storms. While the workforce required to maintain location operations during high season cannot be sustained throughout the year, one of the biggest challenges affiliated with the high-season for these locations was the ability to host seasonal workers. One KI even explained that providing accommodations for seasonal workers does not actually benefit their establishments, as they could rather be renting those rooms out to travelers. This poses a significant issue for establishments, as it does not foster capacity building, and hinders revenue for their businesses.

This inability to most effectively host and accommodate tourists in the high-season is an increasingly important contextual consideration for these locations. Not only due to the increased workload establishments are facing in lieu of hiring seasonal workers, but because this challenge is bolstered by the increasing numbers of homes and locations purchased for the purpose of opening Air B&B destinations.

On one hand, when we have something going on - we don't have enough rooms... But can we sustain that? Over a long period of time? I would say no. We work really, really hard to keep the hotel full. But a hotel in any town is necessary... We talk about adding on a few rooms, and we could *probably* do that. Can we support another big hotel here in town? No, it would. It would kill us.

Accommodation Key Informant

3.3.2 Events-Based Tourism & Sporting Events

Events-based tourism and the ability to host sporting events poses an opportunity for communities to draw travelers into community, fundamentally stimulating the local economy. In addition to events, four of the five community KIs indicated that their ability to support sporting events was vital for their economies, and that local facilities - such as local recreation centres, school gymnasiums, and outdoor fields (i.e., baseball and soccer) - ensure increased visitation throughout the year. However, rural communities are at risk of facing challenges if reliant on events-based tourism, as these events typically occur sparsely throughout the calendar year, and, at times, can attract an influx of guests that cannot be sustained by the accommodation sector (Cunha et al., 2021). The inability to accommodate more than a certain number of guests within the community - or rather, the 'carrying capacity' - results in circumstances of overtourism (Majdak et al., 2022; Rajaonson and Tanguay, 2022).

In order to host events within community, a certain level of capacity and infrastructure is needed (Pulido-Fernandez and Cardenas-Garcia, 2020; Cunha et al., 2021; Singhania et al., 2022). This was reflected by a community KI who indicated that while their community is working to increase the number of events taking place throughout the year, without proper communication, they may face overloading current tourism and hospitality infrastructure (i.e., accommodations, restaurants, public services, etc.).

The positive impact of events-based tourism in community is not limited to economic stimulation, but the ways in which these events engage community members. Participants indicated that hosting events within community can foster local relationships, as well as make the community a more attractive destination for locals (see Dwyer & Wickens, 2013). While only one KI indicated that they foster local-focused events, this is an important consideration to make for rural and remote communities that are seeking to enhance feeling of connectivity – that is, if there is the capacity to do so. As rural and remote communities continue to face challenges in outmigration and youth retention (Singhania et al., 2022), this is an important consideration in supporting the continued development of rural communities. If hosting events provides a sense of pride and enjoyment among residents, there may be an increased sentiment to stay and continue development work within their affiliated communities (Singhania et al., 2022). For future studies, it would be interesting to explore what types of events provide these feelings of community pride and provide the most beneficial impacts for local community members (see Pulido-Fernandez and Cardenas-Garcia, 2020).

4.0 Conclusion & Recommendations

This project not only highlighted the importance on conducting place-specific strategies, but contributed to the understandings of how tourism agencies and organizations can move forward with rural and remote communities to build on local tourism across Manitoba.

First and foremost, it is requested that tourism agencies and organizations consider how to foster local communications and collaborations. While there are organizations that focus on providing tourism-based training programs, it may be beneficial to provide a program with recommendations for working together as a community to build on local tourism; a program that explicitly includes insights on gathering stakeholders, local business owners, and community leaders to strategically outline best practices. By working with stakeholders to cultivate a local network, community dialogue can be enhanced between the various positions of community members. If these developments are of interest, organizations should assess how to best implement program opportunities in an affordable way given financial limitations of rural and remote stakeholders. Working with communities in this way could equip stakeholders with the tools they need to properly strategize approaches in enhancing local visitation based on local desires, needs, strengths, and challenges.

Additionally with regard to supporting local stakeholders, it is recommended that organizations with capacity to engage in marketing efforts work alongside rural and remote communities to market destinations in a more affordable way. While many community organizations engage in their own marketing, it has been identified as a challenge - both in terms of building a target audience, and maintaining posting and publications to ensure awareness of events and assets are advertised effectively to attract overnight guests. While it may not be feasible for tourism agencies and organizations to donate their time and skills, if these resources were designed more affordably, there may be an increase in communities utilizing the available resources to enhance local visitation - which, fundamentally, fosters the local economies.

Finally, with the enhanced financial and capacity strain for specific locations, we recommend exploration into better supporting locations in and near the National and Provincial Parks through policy evaluation and development. As these areas continue to attract overnight guests from across the province and beyond, we believe designing new policy. First, to alleviate the inability to access financial supports and tourism grants for their locations, as well as financially sustain seasonal workers. And second, to explore how to provide resources to these locations when it comes to attaining certifications and additional government requirements that would typically be completed through local agents of a municipality.

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6.0 Appendix 1: Materials & Methods

RESEARCH GROUP 1

The first research group was comprised of Key Informants (KIs) working within the tourism sector. This included both local accommodation stakeholders (i.e., accommodation General Managers (GMs)), as well as Community Stakeholders who work to support economic and social development (i.e., members of the Chamber of Commerce, members for local tourism agencies, city planners, and/ or economic developers). It was the intent to secure the participation of two accommodation GMs and two Community Stakeholders within each participating community. For this project, KIs were asked to participate in Key Informant Interviews, where they were asked semi-structured questions. These interviews were recorded, where then transcripts were created, anonymized, and input into the NVivo program for systematic qualitative data coding.

Two sets of semi-structured interview questions were created to conduct these KI interviews. Accommodation GMs were asked 16 interview questions, and Community Stakeholders were asked 13 interview questions. Of the 16 and 13 interview questions, 6 interview questions were the same for both groups of participants. This allowed for a cross-examination of the responses and perceptions from accommodation stakeholders and community stakeholders. There was a multi-modal approach utilized to conduct these interviews, where 5 were conducted in person and 8 were conducted remotely via the Zoom platform.

RESEARCH GROUP 2

The second research group was comprised of overnight guests staying at participating accommodations. In order to collect this data, participating General Managers of accommodation establishments were asked to administer written surveys to all guests checking into their affiliated accommodation - regardless of the number of guests occupying a single room, one survey was provided per check in. These surveys were administered for two, two-week periods between May and October (2024), the time in which these time periods took place was at the discretion of the GMs. Overnight guests were provided one written survey and one envelope for said survey, and were asked to return the completed survey to the front desk upon checking out of the establishment. Accommodation staff were then instructed to collect completed surveys enclosed and return the completed surveys to the Rural Development Institute at their earliest convenience. Once all surveys were completed, the survey responses were transcribed into the NVivo program for systematic qualitative data coding and review.

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Rural Development Institute

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RDI functions as a not-for-profit research and development organization designed to promote, facilitate, coordinate, initiate and conduct multi-disciplinary academic and applied research on rural issues. The Institute provides an interface between academic research efforts and the community by acting as a conduit of rural research information and by facilitating community involvement in rural development. RDI projects are characterized by cooperative and collaborative efforts of multi-stakeholders.

The Institute has diverse research affiliations, and multiple community and government linkages related to its rural development mandate. RDI disseminates information to a variety of constituents and stakeholders and makes research information and results widely available to the public either in printed form or by means of public lectures, seminars, workshops and conferences.

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