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One step back, two steps forward, one destination's path to tourism recovery.

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Abstract:

One step back, two steps forward, one destination's path to tourism recovery.

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Introduction

Cape Breton Island has long been lauded by travel media as a tourist destination of choice, including being recently named as the #1 Island in North America by Conde Nast Traveler and the #1 Island in Canada during the 2020 and 2021 Travel & Leisure World's Best Awards.

Cape Breton's economy is heavily dependent on the employment and revenue generated by the tourism sector. In 2016, the tourism sector in Cape Breton reported 5,675 employees representing 10.56% of the total employment on the Island which almost exactly mirrors the percentage of the Canadian labour force (Statistics Canada, 2016 Census). The Province of Nova Scotia estimates the annual value of the sector on Cape Breton Island in 2017 as \$330,000,000 with provincial tourism receipts approximately \$2.5 billion (DCBA, 2020).

Tourism is an area of both established and emerging strength for the economy of Cape Breton Island (Brown and Connell, 2021). Like many destinations, the tourism sector has been devastated by Covid-19 related travel disruptions. Cruise ship visitation was lost for 2020 and 2021 (Port of Sydney, 2021), air traffic into Sydney, Nova Scotia's second-largest city, decreased by 88% and, like many destinations across the country, the Island faced strict travel restrictions entering a second year (Ayers, 2020).

As planners attempt their annual alignment of resources to meet tourism demand, the future is difficult to map. What will the tourism landscape, and indeed the world, look like after the pandemic (Lew et al, 2020)? The tourism planning environment in Cape Breton is complicated and crowded, with tourism operators, the DMO, Parks Canada, Indigenous communities, federal, provincial, and municipal governments each formulating plans in silos. Destination Cape Breton Association, the Island's destination marketing organization, launched a ten-year tourism destination management strategy early in 2021, calling for unprecedented levels of collaboration (Cape Breton Island Tourism Strategy 2030, 2021).

This research examines the approach of tourism planners and isolates key factors underpinning their recovery plans. Special attention is given to identifying and examining these variables through the dual lens of sustainability and collaboration.

Literature

Literature supporting an industry rethink concluded that the COVID-19 pandemic can act as a catalytic event in which existing economic and political structures will be challenged and reshaped, and this is an opportunity to redefine the ecological burdens our activities create (Wells et al, 2020). Studying and understanding dramatic changes in how businesses act in the Covid-19 response, recovery, and reset phases is important and useful since pandemics, like other rarely occurring catastrophes, have happened in the past and will continue to happen in the future. (Donthu and Gustafsson, 2020).

Scholarly work published pre-pandemic addressed a future of tourism that has now been significantly altered or, at best, delayed. Untapped potential exists for research related to comparisons of pre-Covid-19 and post-Covid-19 tourism research. (Kock et al, 2020). These authors examine the Covid-19 psyche, developing an Evolutionary Tourism Paradigm, using an oceans and islands model. Faced with a plethora of research study options under the category of tourism impacts of Covid-19, and with the awareness that sustainability has been studied across a wide range of sectors including tourism, this work concentrates on the gap of research focused on the role of sustainability in tourism recovery planning.

Method

The role of sustainability in tourism recovery planning is applied to Cape Breton Island as a case study. Tourism is an industry of storytellers and shared experiences. Choosing a case study approach can be proven to have validity when attempts to understand complex relationships and interactions are involved, such as represented in tourism and related sectors (Beeton,2005).

A research framework was designed and applied to understand the perceptions and behaviours by industry operators, Destination Cape Breton Association (DCBA), and the four levels of government – Municipal, Provincial, Federal, and Indigenous. The attitudes, intentions, and barriers, of the supply side of tourism were explored with a sustainability lens. A qualitative research style was implemented which included two research instruments, developed to garner the information required in the delivery of a credible and relevant analysis: A comprehensive scholarly research review and a series of interviews with key tourism industry stakeholders.

Findings/Results

This research identified both gaps and opportunities related to sustainability planning for the Cape Breton Island tourism sector during its recovery from Covid-19 impacts. Government, business, and community stakeholders acknowledged implications from the pandemic on both short and longer-term developments in the tourism sector. Opportunities focused on increased collaboration for activities such as newly curated visitor experiences and capital investments, while the shifting public health policies made market forecasting challenging, if not impossible. The research showed that as tourism industry actors were forced to decrease or eliminate offerings in 2020, some adopted scenario-based planning as a route to plotting the way back to pre-pandemic revenue levels. By using the industry disruption as an opportunity to rethink strategies with a longer-term view, and by banking on pent up demand, effective target marketing and refocusing on the domestic market, the tourism industry in Cape Breton is poised to step forward with a renewed and positive outlook. Findings included examples of a creative and collaborative decision-making approach.

Conclusion

The typical consumption models of tourists have shifted due to Covid-19 and the production model also continues to shift with tourist characteristics and tourist product features witnessing major changes (Afifi, 2020). Like destinations world-wide, Cape Breton Island tourism operators are faced with an unprecedented disruption.

This work helps establish an understanding of the resilience of Cape Breton Island's tourism sector through economic, human, and environmental responses to tourism sector recovery. Sharing lessons learned from the Cape Breton planning landscape may be helpful to other destinations as they build and implement their recovery plans.

Further research will aid in the understanding of how the concept of sustainability is re-thought by tourism stakeholders on Cape Breton Island post-Covid-19.

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