



Purpose of the Note

This briefing note:

- Provides an overview of the scenario-planning project with the Atlantic Canada Cruise Association.
- Summarizes key ideas discussed during the three scenario exercises.
- Identifies opportunities for the region to pursue in light of various plausible futures.

The purpose of this briefing note is to provide industry members and stakeholders with an overview of the project's findings and recommendations.

About the MacEachen Institute

The MacEachen Institute for Public Policy and Governance at Dalhousie University is a nationally focused, non-partisan, interdisciplinary institute designed to support the development of progressive public policy and to encourage greater citizen engagement.

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‘Riding the Waves’: Scenario Planning for the Atlantic Canada Cruise Industry during the Pandemic

Observations

- Tourism is an important employer for the Atlantic region. Cruise ship passengers bring close to \$350 million into the region and help to support more than 2,000 jobs (BREA, 2021).
- The cruise industry depends on international markets and social license. Increasingly, this means making progress in environmental, social and economic sustainability, according to the U.N.
- Scenario-planning exercises helped us to identify and explore many volatilities in the tourism sector.
- Despite the importance of the sector, many of the jobs are short term with low pay and few benefits, which produce an unstable workforce, subject to the whims of the market.
- The key market is the older population with increased health concerns and vulnerabilities.
- The various ports have different resources and capacities and depend largely on SMEs, which can make coordination costs high. Past crises like SARS in Toronto demonstrated that cooperation across organizations, including all orders of government and private industry, can help the industry to bounce back better.
- Reliance on SMEs with immediate and short-term pressures means it is difficult for the sector to prepare for medium-term challenges and opportunities. This dynamic has resulted in concern about availability of labour and will make strategic planning for environmental sustainability challenging.
- During COVID-19, a consensus formed that the tourism sector is an important one that has suffered considerably. There might be an opportunity to use this heightened profile to strengthen medium-term strategic planning across the region.

Introduction

In recent years, the \$154-billion cruise industry has been the “fastest growing” industry in the tourism sector, with more than 29 million passengers annually (Coggins, 2014, p. 138; Clancy, 2017; CLIA, 2020). The COVID-19 pandemic, however, has had a devastating impact on the Canadian tourism sector and economy and, in turn, the cruise industry. In May 2020, Transport Canada prohibited overnight passenger vessels that carry more than 100 people from operating in Canadian waters until at least October 31, 2020 (Pottie & Grant, 2021). As a result, there was no cruise season in Atlantic Canada in 2020. The extension of the federal no-sail order to February 28, 2022 (which Transport Canada changed to November 1, 2021 in July 2021), and the high level of uncertainty associated with the virus presented additional challenges and opportunities for the cruise industry. Although it has limited control over several aspects of this situation, the industry must consider and prepare for a number of plausible outcomes for next cruise season and the medium term.

Project Details

This project was conducted in partnership with the Atlantic Canada Cruise Association (ACCA) and supported by the Atlantic Canada Opportunities Agency (ACOA) (Project Number: 217507).

The purpose of this project is to bring together members of the Atlantic Canada cruise industry and related stakeholders to participate in two rounds of scenario-planning exercises that will help the industry identify and manage risks and seize opportunities in the short and medium term.

The project consisted of seven scenario-planning sessions—four in the spring and three in the summer/fall. The sessions took place both online and in-person. The first round of sessions focused on 2022 when it is assumed cruise operations for Atlantic Canada will have resumed. The second round of scenario-planning sessions focused on a three-to-five-year outlook for the Atlantic Canada cruise industry and included two scenario-planning exercises. The first exercise focused on environmental sustainability and the second looked at labour challenges and the future of work.

These sessions also included presentations by four guest speakers. During the first round, David Robinson from Destination Canada spoke about the recovery of the tourism sector, and Shane O’Flaherty from Microsoft discussed technology and the cruise sector (see Appendix B for the guest speakers’ biographies). During the second round, Claus Bødker from Cruise Baltic & Cruise Copenhagen Network presented on environmental considerations for the industry, and Sandra McKenzie from the Forge Institute discussed the future of the labour force.

Method

We worked closely with the ACCA to prepare for these two sets of scenario-planning sessions. The ACCA provided the cruise expertise for this project, including data for the pre-session reports and advice about who to invite to the sessions, while the MacEachen Institute conducted desktop research prior to the distribution of pre-session materials, hosting of the scenario-planning sessions, and the release of the final report.

We employed the Chatham House Rule during our discussion at the sessions, which means that we collected and summarized participants' ideas but did not attribute them.

Background

Risk governance

Context can help us understand how various social and economic pressures are exerted on government responses to risk, while risk governance provides a structure to examine how people assess, manage, and address risks. Not all risks are the same; they can be classified according to how much we know about them. Simple risks are those that have reliable data and are easier to predict. Uncertain risks exist where there is an absence of reliable predictive data to help us plan for the future. COVID-19 can be classified as an uncertain risk, particularly during the early stages of the pandemic. Arguably, COVID-19 has assumed aspects of an ambiguous risk, with conflicting interpretations of the risk, what it means and what to do about it.

Scenario planning

A scenario is not a prediction of the future but rather an attempt at understanding causal factors that impact a particular organization or sector and how to address them. Successful scenario planning requires active participation by those involved in the sector, with people coming as individuals with a wide array of views. While there are many scenario-planning methods, we employed the intuitive logics method and drew on the work of Van der Heijden, Van Asselt, and others, with some modifications of our own. An essential step of the scenario-planning process is to identify which driving forces have the most impact and which are the most difficult to predict or most uncertain. We plot these driving forces on a 2 x 2 matrix to identify four potential scenarios and to develop strategies for addressing these futures.

The cruise industry

The cruise industry injects more than \$2 billion into the Canadian economy and supports about 30,000 jobs across the country. The industry anticipated another year of growth for 2020, including Atlantic Canada, which experienced a 52% increase in cruise passenger arrivals between 2016 and 2019 (BREA, 2021). The COVID-19 pandemic, however, has resulted in the suspension of two consecutive cruise seasons for the region, which has also impacted the tourism sector and related businesses. While Atlantic Canada has fared better than other parts of Canada, the uncertainty associated with COVID-19 variants and the return of global tourism and cruising poses challenges for the industry. By employing scenario planning, the cruise industry can examine these challenges and develop recovery strategies in light of different futures it could experience.

Past crises

Crises are not new to the tourism sector. While COVID-19 is the most significant in the sector's modern history, 9/11, the U.K. Foot and Mouth Disease Outbreak, SARS, the 2007-8 financial crisis, and H1N1 are recent examples of events that have demonstrated the sector's volatility, a consequence of its fragmented supply chain. What is perhaps most surprising is that so many people can work in a sector so volatile. The paradox is that the more successful the sector is in terms of job creation, the more vulnerable are the people who work in it.

Key Observations: 2022 Season Scenarios and Initiatives

Principal concerns: While the sector believes demand for cruise in the region will bounce back, it is concerned about its capacity to host visitors next cruise season. The concern stems largely from access to labour, health protocols and the fragility of local tourism supply chains, which are crucial aspects of the tourism experience for visitors.

Principal opportunities: The sector can strengthen coordination with local supply chains, other regional ports, key government and national tourism and public health stakeholders to ensure stability and consistency in the visitor experience.

Other notes: The scenario sessions underscored that access to financial and human resources differ from port to port, which suggests that it is not a one-size-fits-all solution to the current challenges. Aligning standards and delivering consistent experiences to visitors requires a high level of coordination, which is challenging for some ports. The variation in experiences with COVID-19 across the region underscores the risk governance challenges that lie ahead.

Key Observations: Green Scenarios and Initiatives

Principal concerns: On the demand side, customers' interest in green experiences are unclear and potentially volatile. Ostensibly, people prefer environmentally sustainable practices; however, polling data suggests that price is the key determining factor in holiday selection, followed by time and convenience (Jones, 2021). Government regulations from Canada and abroad (including a key market like the U.S.) are more likely to drive sustainability practices. On the supply side, financial constraints and uncertainty brought about by the pandemic raise questions about port cities' financial capacity to make green investments in the medium term.

Principal opportunities: Take advantage of the pent-up demand for travel to generate revenue streams for future investments, including more sustainable experiences. Take advantage of the region's reputation as a safe and environmentally friendly place to visit to develop further this brand. Prepare proposals to develop sustainable infrastructure in light of future funding opportunities that may come to help the tourism sector recover from the pandemic.

Other notes: The sector struggles with medium-term initiatives for which there is an absence of financial incentives. The sector will likely require senior level buy-in with financial support and government directives to make progress in this area. It will also require community engagement with key stakeholders including environmental and heritage NGOs.

Key Observations: Labour Scenarios and Initiatives

Principal concerns: With the highest share of seniors in Canada, the region is concerned about aging workers' impact on tourism labour and operations. Combined with upward pressure on wages, significant changes to the labour supply could add to existing staffing shortages and capacity issues. A lack of financial and human resources and insufficient information sharing also contribute to concerns about the stability of local supply chains.

Principal opportunities: Recruit workers from different labour pools, offering incentives appropriate for the particular labour pool to which the sector is appealing. By strengthening partnerships with post-secondary institutions and settlement agencies, the industry can enhance its recruitment of students/recent graduates and immigrants, respectively. Introducing more cluster employment opportunities can help address tourism labour shortages by providing employees with stable, year-round work throughout the region. The sector can also think about how to incentivize older workers back to the labour market. Finally, through more emphasis on education, training, career development and medium-term goals, the region can work to professionalize the sector.

Other notes: Labour shortage is a challenge for many sectors. The pandemic has raised the profile of various labour challenges in the tourism workforce. Due to the aging population and outmigration, rural communities have been the most vulnerable to labour force changes. While investing in technology could help the sector address labour issues and prepare for the future, many businesses do not have the capital or certainty required to make such investments. Addressing future labour issues will require the sector to reconcile its need to professionalize with its ongoing dependence on low-wage and seasonal labour.

Discussion

The tourism sector depends on social license from the community and the public at large to operate. This idea builds on the principles of ethical tourism: “tourism in which all stakeholders involved apply principles of good behaviour (justice, fairness and equality), to their interactions with one another, with society, with the environment and other life forms” (Lovelock & Lovelock, 2013, p. 12). As the COVID-19 pandemic has brought to light, tourists and destinations alike, including residents and tourism operators, have a moral responsibility to protect the health and safety of those they encounter.

In response to COVID-19, residents and travellers will expect high health and safety standards at ports and visitor attractions, particularly the older population who can be vulnerable to disease. Comprising mainly SMEs, the tourism sector is more focused on short-term planning and operations and worries less about longer-term investments or shouldering losses brought about by crises. This defining feature can also make it difficult for the sector to organize and coordinate operations. While the cruise industry is more forward-looking with itineraries and cruise bookings taking place years in advance, the absence of foresight in the broader tourism sector challenges the industry’s ability to address longer-term concerns, such as environmental risks and labour issues.

Environmental considerations

The three dimensions of sustainability—social, economic, and environmental—are pre-conditions for the future of the cruise industry, including its growth. Environmental sustainability is often depicted as the most challenging part to address as it is largely outside of the industry’s control. As we experienced during our discussions of green scenarios and initiatives, the information and awareness about environmental risks and tourism is insufficient, which challenges the industry’s planning. As we discuss below, environmental sustainability is also not a pressing issue or concern to many travellers. The cruise industry, and tourism more generally, however, need to be aware of the impact they can have on the environment and how it could affect future demand for travel and tourism. In this light, climate change and its associated

impacts pose significant risk for the sector. Therefore, thinking strategically about how the sector can get organized and plan for its future is critical.

In light of the impacts of tourism and travel on climate change, the sector needs to showcase what its industries are doing. In 2017, Atlantic Canada was the sixth largest GHG emitter in Canada (The Conference Board of Canada, 2020). Coupled with the growth of “socio-environmental consciousness” and responsible tourism (Destination Canada, 2021b, 35), demonstrating the industry’s commitment to sustainability to the public, travellers and government is key to maintaining a positive reputation and image. As a regional industry, implementing consistent standards will be significant. Cruise Baltic, for example, has worked with a consulting company and established a sustainability manifesto to help its region develop, implement and communicate the sustainability standards in place across its ports (Cruise Baltic, 2019).

Environmental sustainability is becoming a more important consideration for travellers. Mundy Cruising found that about 50% of respondents ranked sustainability as an important consideration in booking a cruise, while only 14% considered it unimportant (Davies, 2021). 57% also responded that they have faith in the cruise industry’s environmental approaches, while 12% did not. Additionally, 79% of respondents thought that the industry is working towards its green commitments (Davies, 2021). Travel costs, however, continue to be the most influential consideration for prospective travellers. The Vacationer found that 61.75% of those surveyed identified cost as the most important factor, on par with cruisers (Cruise Critic, 2021), while only 4.38% of respondents indicated sustainability and their carbon footprint (Jones, 2021).

Labour considerations

Tourism industries are vulnerable to the whims of the market, including but not limited to Canada’s aging labour force and declines in labour supply. Weak coordination among tourism industries, including cruise, has made the sector particularly vulnerable to labour challenges, including recruitment. In light of these issues, the sector needs to develop stronger connections to the labour market and supply through collaboration and partnerships with post-secondary institutions and government, which could help professionalize the sector and create more opportunities for employee-sharing. The sector, however, continues to depend on low-wage and seasonal workers, which, coupled with upward pressure on wages, could lead to additional challenges for tourism industries.

With the highest share of seniors in Canada, tourism industries in Atlantic Canada will need to adapt and support the needs of an older workforce (Whalen & Eisen, 2020). In 2016, Nova Scotia had the highest proportion of mature tourism workers in the country, with 35.4% of workers over age 45, an increase of 2.3% from 2011 (Tourism HR Canada, 2019). With the exception of New Brunswick, the proportion of tourism workers over age 65 in the Atlantic provinces also exceeded the Canadian average of 3.7% (Tourism HR Canada, 2019).

Canadian industries are also experiencing labour shortages. In 2016, the Canadian Tourism Research Institute estimated that over 240,000 or about 10% of tourism-related jobs could become vacant between 2010 and 2035 (Murray, 2017). While 89% of workers will leave their job at an SME in the next year due to wages (57%) or benefits (32%; Business Development Bank of Canada, 2021), declining birth rates have also contributed to labour shortages (Tourism Industry Association of Canada [TIAC], 2014; El-Assal and Goucher, 2017). Further, perceptions about tourism jobs could be contributing to staffing shortages. Low wages and

limited career advancement opportunities are among the characteristics that deter people from working in the sector, particularly students and younger workers (TIAC, 2014; Goh & Okumus, 2020).

Government responses to COVID-19 have also contributed to labour shortages for tourism industries. Federal support programs, such as Canada Emergency Response Benefit (CERB), have disincentivized some workers from returning to the sector. According to a 2020 Canadian Federation of Independent Business study, CERB was a top reason for 62% of the small businesses that experienced work refusals from laid-off employees.

Attracting more immigrants to the region and sector represents one part of a labour planning strategy for the sector. In 2019, landed immigrants accounted for about 12% of the Atlantic provinces' tourism workforce, compared to 30% of Canada's tourism labour (Tourism HR Canada, n.d.). The region has also experienced issues in retaining international students, with the lowest retention rate in Canada at below 30% (Choi, Crossman, & Hou, 2021). While the pandemic further compounded labour challenges, its impacts on tourism also emphasized the sector's need to strengthen its recruitment efforts through partnerships with settlement agencies and post-secondary institutions and finding a balance between entry-level and senior-level positions.

Cluster employment platforms will play a role in the future of the tourism workforce. In short, cluster employment is a type of employee-sharing “designed to connect employees with multiple employers” (Community Sector Council of Nova Scotia, 2020, para. 3). Due to the seasonal nature of tourism, the method can support the tourism workforce by providing more stable employment opportunities. This type of work can be particularly attractive to younger workers interested in expanding their skills and professional networks.

Technology also provides tourism with an opportunity to address labour shortages by relieving some of its dependence on human resources, thereby lowering labour costs. Investments in technology, such as automation, are becoming more common in tourism industries (Goh & Okumus, 2020). Increasing the sector's use of digital kiosks to limit human-to-human interaction, for example, could also help them prepare for a future in which governments and visitors are more concerned about disease transmission.

Recommendations

The cruise industry in Atlantic Canada benefits from a collaborative approach; there is a shared interest in working together and, in fact, expanding the existing partnership to include new partnerships with private industry and the community/NGO sector to articulate a shared vision for the sector.

The tourism sector, including the cruise industry, finds itself in a highly fluid situation. There is a high degree of uncertainty on the demand and supply side. On the demand side, uncertainties include how the market will bounce back from COVID-19 and how environmental concerns in the population will impact demand. On the supply side, uncertainties include health protocols, the availability of labour, environmental standards, infrastructure investments and how to maintain social license in a community.

Good risk governance in a highly uncertain context requires reliable information, informed yet flexible standards and adaptive capacity in the workforce and among stakeholders. With this in mind, we offer these recommendations.

- Stronger coordination function at the local, regional and national level. The sector is highly dependent on SMEs; it requires capacity to coordinate and develop shared positions across sectors and jurisdictions; it requires engagement with all orders of government, industry and NGOs, particularly community, health, environmental, labour and heritage/cultural organizations.
- The labour market, particularly for low paid service jobs, is highly volatile at present, partly due to COVID-19; however, these challenges are not likely to go away in a post-pandemic era. Labour shortages will continue to be a challenge for the region. The sector requires stronger connections to universities and colleges, immigration services and cluster employment services and platforms; stronger retention strategies, including an understanding of how competitive the labour market is as well as the unique needs, concerns, skills and aspirations of its existing employees and how to support them. They will also need to consider how to incentivize the aging workforce to continue working. They will also have to further professionalize the sector with more stable employment and higher salaries and a structured career path. The ‘great resignation’ (Bartleby, 2021) has brought these issues to the fore but these labour force issues have been emerging for some time in the tourism sector and will require ongoing commitment from the sector to address them.
- The vulnerabilities of the sector have received considerable profile during the pandemic. To address these vulnerabilities and challenges, the sector should develop stronger medium term plans. This planning will require support from and engagement with senior leadership and regional communities. Given the number of stakeholders and jurisdictions, a strictly top-down approach is unlikely to be successful. Therefore, stronger cooperation and alignment are required.
- Finally, the sector will require a strong research capacity to monitor best practices and regulatory positions on the international stage. The future of cruise in Canada will depend partly on the performance of the local operators and policymakers, but will also depend on decisions by tourists and governments made in international markets; the industry will have to keep a close eye on international trends in travel, health and environment.

Next Steps

Establish strong community-based stakeholder committees at the port, including key suppliers, NGOs and public health, to address tourism supply chain issues, such as transportation. Membership should reflect current and future sense of the industry and community.

Use the new focus and momentum in the sector to further sustainability planning.

- Short- and medium-term plan to address labour shortages
- Medium-term environmental plan that can take advantage of emerging climate change focus and opportunities

Strengthen the local research function to help anticipate changes in social license and international markets, particularly the U.S. and European regulations.

Conclusion

The COVID-19 pandemic has resulted in an immensely challenging period for the global cruise industry, including the Atlantic region. With vaccination rates continuing to rise and restrictions lifted, there are reasons for Atlantic Canada to be optimistic about its next cruise season.

Together, the volatility of the tourism sector and uncertainty of the virus, however, will require the industry to be adaptive and flexible in planning for the return of cruises to the region and future challenges. Strengthening coordination at local and regional levels will be key to managing these risks and planning strategically. Through collaboration with the three orders of government, the tourism sector can begin to visualize its future and identify how it can address ongoing and future issues, including environmental concerns and labour supply. Connecting with various stakeholders, including port communities and regional suppliers, will also play a role in the industry's ability to deliver safe, consistent and sustainable experiences to visitors.

Appendix

Appendix A: More about the MacEachen Institute

The MacEachen Institute for Public Policy and Governance at Dalhousie University is a nationally focused, non-partisan, interdisciplinary institute designed to support the development of progressive public policy and to encourage greater citizen engagement.

In February 2015, the Directors of the MacEachen Institute for Policy and Government [announced](#) a donation to Dalhousie University of \$2.25 million. The donation was used to establish the Institute in the name of the [Honourable Allan J. MacEachen](#).

A partnership with national reach

The MacEachen Institute for Public Policy and Governance at Dalhousie University provides an effective non-partisan mechanism to expand the reach and impact of the Institute's work. As such, it enables us to build on Mr. MacEachen's legacy by promoting vigorous debate on progressive public policy issues. Most importantly, it encourages and engages active participation by Canadian citizens in civic activities ranging from community and neighbourhood issues to issues of national concern.

Independent and informed

The Institute looks at progressive ways to tackle public policy and governance issues through open discussion with a variety of informed players and aims to serve as the "go to" place provincially, regionally and nationally for rich, robust public policy debate, discussion and research. The MacEachen Institute at Dalhousie University engages scholars, students and community members in the development of policy options, policy research and other outputs of the Institute.

The Institute has worked to create resources and policy discussion around the COVID-19 crisis. These include briefing notes, panel discussions, videos and media commentary. You can find [all resources related to COVID-19 on our website](#).

Appendix B: Guest speakers

Round one

Shane O’Flaherty, Global Director of Travel, Transportation & Hospitality, Microsoft

Shane is focused on leading the hotel, airline, cruise and logistics industries in driving innovation that will enhance the customer and employee journey, while driving increased productivity and cost compression with the use of Microsoft’s technology and its eco-system of travel solution partners. Prior to joining Microsoft, Shane held many senior executive positions including CEO & President at Forbes Travel Guide (formerly Mobil Travel Guide). At Forbes, Shane successfully modernized the hotel, restaurant and spa Five Star ratings system that defines the global consumer experience and spearheaded its global expansion. He created and grew Forbes Travel Guide Consulting Services into the leading global provider of customer experience measurement and training for the top hospitality brands in the world. Shane has spoken at many industry and client conferences globally and also appeared on the Today Show, Fox and Friends, Bloomberg, Channel NewsAsia, and been quoted in the New York Times, Wall Street Journal, USA TODAY and many other global publications highlighting the travel and hospitality space.

David Robinson, Vice-President of Strategy and Stakeholder Relations, Destination Canada

When David’s North Star led him to Destination Canada in 2016, he had built an impressive career across a broad portfolio of government agencies and a record of accomplishment particularly in the areas of leadership and government relations. In his prior role as Director General of Strategic Coordination at Veteran Affairs Canada, he led improvements in the organization’s corporate governance and the department’s parliamentary business. One of the many defining moments in David’s career was leading the Government of Canada’s preparations for the Vancouver 2010 Winter Olympic and Paralympic Games from 2001 to 2010. David, along with his team, provided strategic direction and sought the funding that allowed the Government of Canada to take full advantage of the Games to bring more of Canada to the world. David brings this same passion and open-mindedness to his current work at Destination Canada.

Round two

Claus Bødker, Director, Cruise Baltic & Cruise Copenhagen Network

Claus Bødker joined Cruise Baltic and Cruise Copenhagen Network in May 2014. He came from a position as CEO in a subsidiary of the National Lottery in Denmark. Claus has spent most of his career in the experience economy marketplace, including a management position with the leading Danish soccer club, F.C. Copenhagen.

Claus brings with him 14 years of experience from the travel industry with companies such as KILROY International, Thomas Cook and Hertz Denmark, where he was CEO. He holds an MSc in Economics and Business Administration from Copenhagen Business School, an MBA from Henley Business School and a Master in Experience Economy from Roskilde University.

Sandra McKenzie, Co-Founder, The Forge Institute

Sandra McKenzie has extensive government experience in the fields of workforce development, adult education, economic development, and policy and strategic planning. She has served the Province of Nova Scotia as Deputy Minister of Education and Early Childhood Development, Deputy Minister of Labour and Advanced Education, and Acting Deputy Minister of Economic and Rural Development and Tourism.

After concluding a rewarding career with the public service, she is very pleased to have launched two companies: McKenzie Consulting, a management- and strategy-focused business, and The Forge Institute, a partnership dedicated to thought leadership for positive change. Sandra serves on several volunteer Boards, all focused on creating stronger communities.

Sandra lives in Waverley with her husband and many pets. She is visited regularly by her three children who are out making the world a better place.

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Further Reading

Quigley, K., Bisset, B., & Mills, B. (2017). *Too critical to fail: How Canada manages threats to critical infrastructure*. Montreal: MQUP.

The [discussion paper](#) and [briefing note](#) from the tourism scenario planning sessions in August 2020.

The MacEachen Institute's [expert panels](#) on risk governance and economic and public health challenges posed by COVID-19.

The Toronto tourism sector's response to the [SARS outbreak in 2003](#) demonstrates the significance of maintaining coherent coordination, while the [Foot and Mouth Disease outbreak in the United Kingdom in 2001](#) underscores the vulnerabilities of a highly fragmented tourism sector.

Disclaimer

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