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Mindful continuation? Stakeholder preferences for future tourism development during the COVID-19 crisis

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ABSTRACT

Discourse in the early stages of the COVID-19 pandemic explored its likely effects on the tourism sector including the nature of recovery. Viewed through the lens of Evolutionary Economic Geography, this paper examines the preferences of four stakeholder groups for future tourism development in Northern Devon. Specifically, it reports on their views from 2021 and 2022 of three potential scenarios which were elaborated before the pandemic, and it explores whether COVID-19 was a trigger event for a change in trajectory. There was consistent support for the most sustainable trajectory, which represented the continuation of the existing arc of development, not a fundamental change in direction triggered by COVID-19. Not only does this finding contribute a retrospective critique of early opinions on possible COVID-induced change, it suggests an alternative view of the role of trigger events in destination evolution. The pandemic offered space for reflection on tourism development, as a form of 'mindful continuation' of transformation, not a 'mindful deviation' identified in some previous studies.

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Introduction

Prior to the COVID-19 pandemic significant discourse questioned the level and nature of tourism development around the world, including the proliferation of overtourism (Dodds & Butler, 2019). As the pandemic unfolded, commentators imagined various futures for travel and tourism (Lew *et al.*, 2020). In views often associated with 'industry', some desired a return to 'business-as-usual' -the traditional growth-led paradigm- as markets recovered (Higgins-Desbiolles, 2021). Others, including several contributors to this journal (e.g. Higgins-Desbiolles, 2020; Prideaux *et al.*, 2020) viewed the pandemic as a chance to establish a 'new normal' (Ateljevic, 2020), more sustainable in nature (Ioannides & Gyimóthy, 2020), by 'building back better' through 'green recovery' and 'transformative change', to use the (political) rhetoric of the day (e.g. Department for Digital, Culture, Media and Sport (DDCMS), 2021).

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Inherent in both discourses were valorisations of, and value judgements on, existing trajectories for tourism development. Whether intentionally or not, they resonated with ideas in Path Dependency Theory (Martin & Sunley, 2006; Stark, 1991) and Evolutionary Economic Geography (EEG; Boschma & Martin, 2007; Martin & Sunley, 2015), which together provide an appropriate conceptual lens for reading longer-term tourism development (Anton Clavé & Wilson, 2017; Brouder, 2014; Ioannides *et al.*, 2014). Yet few studies, if any, have systematically investigated preferences for post-COVID tourism trajectories during the pandemic, nor how they relate to prior paths for destinations at the local or regional levels. Fewer still have deployed EEG for this purpose despite its analytical potential (cf. Brouder, 2020). Notwithstanding the appeal of a more sustainable future, there has been little critical examination of what may happen to existing approaches to deliver sustainable tourism development, for instance addressing the climate crisis (Coles, 2021) or overtourism (Dodds & Butler, 2019). Juxtaposed with discourses implying crises are almost inevitably trigger events for major change (Higgins-Desbiolles, 2020; Her Majesty's Government (HMG), 2020; Sigala, 2020), we observe that COVID-19 did not necessarily result in a fundamental transformation of a destination's evolutionary trajectory.

This paper examines how possible futures for tourism development in Northern Devon were valorised by stakeholders during the pandemic with special reference to the longer-term evolution of a nature-based destination. As one of few papers of its kind, it reports on research, started before the pandemic, in which three scenarios for tourism development in the locality were elaborated, then appraised by stakeholders during the COVID-19 crisis. Adopting the conceptual apparatus of EEG, it examines path preferences and whether the pandemic impacted the choice of preferred scenario. Its principal contribution is a critical, evidence-based assessment of how far the pandemic acted as a trigger event, stimulating transformative change in the direction of future tourism development and strategy at the local level. In so doing, it raises important conceptual and theoretical questions for scholars of EEG and destination development. In the next section we examine how the likely effects of the pandemic on tourism were initially portrayed, and how this relates to concepts in EEG.

Tourism trajectories, the pandemic and evolutionary economic geography

Quick to 'lead thought' after the World Health Organization declared the pandemic, several 'opinion pieces' explored the consequences of COVID-19 for the tourism sector (cf. Yang *et al.*, 2021). In these rapid publications, an early consideration was how long and in what ways the pandemic may affect the tourism sector (Polyzos *et al.*, 2021; Yang *et al.*, 2021: 10). As Higgins-Desbiolles (2021) observed, a bifurcation emerged among views. Some commentators, particularly in policy and practice, argued persuasively for the resumption of the 'old normal' and for 'bounce back' as soon as practicable. Government interventions to sustain the sector and those relying on it, were commonly-invoked solutions (Hall *et al.*, 2020). Within this genre a major focus appears to have been when recovery may be and the support required to achieve it (cf. DDCMS 2021). Other commentators -especially but not exclusively in the academy

(e.g. UNWTO 2020)- took a different approach questioning whether the current paradigm of tourism development remained appropriate. The pandemic was portrayed as an unprecedented moment for transformation (Brouder, 2020), a chance to reset dominant modes of production and consumption, governance and regulation in order to reduce the many negatives associated with them (Ateljevic, 2020; Ioannides & Gyimóthy, 2020; Sigala, 2020).

As Brouder (2020) observed, discourses of this nature engage with core concepts and thinking in Evolutionary Economic Geography. As a theoretical framework, EEG is concerned with the spatial evolution of economic landscapes over time (Boschma & Martin, 2007), and how historical legacies shape regional and institutional use of resources and capabilities. EEG uses the metaphor of a 'path' to articulate the direction of evolution or change: paths may recapitulate past patterns, or -as a consequence of innovation- branch into new trajectories. Those extolling a post-Covid resumption of the 'old normal' align with the idea of 'path dependency'; that is, forms of current and future development that are rooted in the past and/or have very limited capacity for innovation (Anton Clavé & Wilson, 2017: 99). In contrast, discourses espousing more radical departure from the past, resonate with 'path creation' (Karnøe & Garud, 2012). Resulting from an agenda-shifting 'trigger event', such as the fall of the Berlin Wall in 1989 (Williams & Balaz, 2000) or 9/11 (Brouder, 2020), a new path -qualitatively different from before- is taken. The direction of change may be 'path free' whereby prior progress is eschewed in favour of a new start from a *tabula rasa*. More commonly though, as accounts of post-socialist tourism transformation indicate (Coles, 2003; Williams & Balaz, 2000), development builds on legacies from the past. The apparent binary between 'path dependency' and 'path creation' is challenged by the idea of 'path plasticity' (Anton Clavé & Wilson, 2017; Halkier & Therkelsen, 2013). Destination development can take place on malleable or 'plastic' paths that are repeatedly formed and (re)formed by multiple, incremental changes, induced by events and/or changing conditions.

During the last decade EEG has been increasingly advocated and applied in tourism research (cf. Brouder, 2014; Brouder *et al.*, 2017). Several empirical studies have employed its conceptual architecture to chart destination evolution. For instance, Ma and Hassink (2014) read the long-term development of the city of Guilin over four decades, while Gill and Williams (2014) investigated sustainable local development in the resort of Whistler through the issue of affordable housing. Adopting a regional focus, Halkier and Therkelsen (2013) considered the rise of coastal tourism in Jutland, while Anton Clavé and Wilson (2017) explored path dependency in the Costa Daurada, Catalonia.

Many of these studies were published during times of relative (macro-economic and political) stability (Hall, 2022), not times of crisis. Perhaps as a result -and arguably also because of an early focus on technological innovation as a locus for regional development- EEG studies of tourism appear to regard (new) 'path creation' positively, as agile and advanced, with the ability to adapt to emergent or forecast conditions. Conversely, 'path dependency' is portrayed more negatively as being reliant on, or 'locked-in' to, the past with neither the capacity and/or capability to deliver the institutional innovation necessary for more radical or ambitious change (Brouder, 2020). Path dependent processes are framed as passively conditioned by history and

'random events' (David, 1985) rather than the outcome of active assertions of human agency (Garud & Karnøe, 2001). Emblematic of this, Ma and Hassink (2014: 580) read the 'emergence of the Guilin tourism area [as] not only influenced by contingent events, but also basically rooted in its initial conditions...' and '...embedded in the resource-based path dependence of tourism products and the institutional path dependence of tourism sectors'. Isaksen (2015), albeit not writing about tourism, refers to regions 'trapped in path extension', almost in a perpetual continuation of previous trajectories of development. This resonates with Gill and Williams (2014: 557) account of Whistler where valiant efforts to transition to a more sustainable path were compromised by an administration that re-emphasized business interests. Even accounts of 'path plasticity' stress how constraints in institutional innovation may limit the nature of development. For instance, Halkier and Therkelsen (2013: 48) note the predominance of SMEs as a source of potential inertia in Jutland while Anton Clavé and Wilson (2017: 108) warn of the dangers of 'political short termism' for frustrating path creation.

Underplayed in EEG studies of tourism development appears to be the possible merit of some forms of path dependency. For instance, in a wider theoretical discussion Martin (2009: 22) notes the dangers in equating lock-in 'to the reproduction of what exists, to yet more of the same, but not to evolution'. Path dependency may act as a form of resilience where a progressive, beneficial agenda for development has already been initiated, but is threatened by potentially disruptive conditions, and/or the evolutionary process is yet to be fully completed. Put another way, path creation is not a guarantee of a more sustainable trajectory. It is not necessarily preferable to continuing an existing evolutionary trajectory.

Positive coding of path creation in EEG seems to relate to assumptions about the nature of 'trigger events' (Osmond *et al.*, 2009). These are broadly viewed as disruptions that catalyse tangible action and instigate (beneficial) transformation. This follows Mezirow's (1978) conceptualisation of trigger events in transformative learning theory (Calleja, 2014: 129), where life crises and other 'disorientating dilemmas' lead to reflection precipitating psychological transformation. Actions taken in response to a trigger are, of course, preceded by decision-making and this is the basis for conceptualising 'mindful deviation' from established to more desirable paths (Garud & Karnøe, 2001; Gill & Williams, 2014). However, there has been little consideration in tourism studies, especially as they relate to crises, that reflection may result in a conscious decision or preference to continue with an existing plan, rather than to diverge from it; in other words, that there may be a deliberate or 'mindful continuation' of a previous path (and its accompanying actions). Perhaps closest is Baekkelund's (2021) discussion of 'reproductive agency' in rural tourism in Western Norway. Drawing on Gillitsch and Sotarautá's (2020) 'trinity of change' (innovative entrepreneurship, institutional leadership, and place-based leadership), she argues for a more nuanced view of agency at different phases in a development path. Reproductive agency is valuable as a stabilizing factor, an alternative end of a spectrum to active change agency, and it 'should not be reduced to pure obstruction or equated with non-agency' (Baekkelund, 2021: 758).

Re-reading early commentaries of tourism trajectories under COVID-19 in this way highlights three critical issues. First, they have not stimulated systematic *post hoc*

empirical verification (cf. Yang *et al.* 2021), in particular local place-based studies which is an inherent strength of EEG scholarship (MacKinnon *et al.*, 2019). Second and connected, although time is implied in these commentaries, it is not treated in a systematic manner. This too may be a limitation of EEG research more generally which often lacks consistent empirical treatment of longitudinal change (Henning 2019). Still, as Yang *et al.* (2021: 12) observe, tourism studies of COVID-19 have been mostly cross-sectional, one-off and *ad hoc* in nature. Moreover, we would contend there has been little consideration of existing local development trajectories nor how these legacies were incorporated into, or excluded from, unfolding COVID-related tourism pathways. Visions of the future relate to their pasts and are assembled in specific cultural contexts (Grillitsch & Sotarauta, 2020). Thus, trigger events may have prompted locally-contingent appraisals of the relevance of locking-in to previous trajectories, and 'lock-in' need not necessarily be read as a consequence of institutional inertia (Brouder, 2020; Halkier & Therkelsen, 2013) rather it may be a continuation of prior beneficial change. Finally then, in studies advocating a 'new normal' there is an implicit perception of what went before as inadequate, thus inferring a 'crisis of sustainability' to that point (Gössling & Schweiggart, 2022; Higgins-Desbiolles, 2020, 2021). Yet, very little evidence, if any, has been presented to support the supposition that alternative approaches are perceived more favourably by destination stakeholders. Indeed, some critical scholarship has cautioned against the unanticipated consequences of new path creation without proper analysis; commentators in favour of radical transformation should be 'careful of what they wish for' (Hall *et al.*, 2020: 577).

These critical issues are revisited later. The next section introduces Northern Devon as one among many destinations with long-term commitments to the sustainable development of tourism and outlines the empirical research that examined stakeholder scenario preferences during the pandemic.

Researching tourism futures in Northern Devon

Context

Before the pandemic the future trajectory of tourism development in the UK was an intensive discussion point (Coles, 2021). At the national level, the Westminster government made urgent growth of tourism central to its post-Brexit economic policy. In a 'Tourism Sector Deal' (HMG, 2019) ambitious growth targets were agreed with sector leaders in exchange for government investment and regulatory reforms. Tourism is, though, a devolved responsibility. In addition to new plans for England, Wales, Scotland and Northern Ireland, at the sub-state level in England local authorities had already started to consider their futures, both independently and in collaboration with other stakeholders in complex arrangements for 'destination' management (Coles *et al.*, 2014).

One such destination is Northern Devon, comprising the districts of North Devon and Torridge, and associated with the North Devon UNESCO Biosphere Reserve (Figure 1). Located in South West England, it is a popular destination for domestic and international visitors. Two main place-specific characteristics have framed tourism path development in the locality. First, its physical remoteness means that it is not

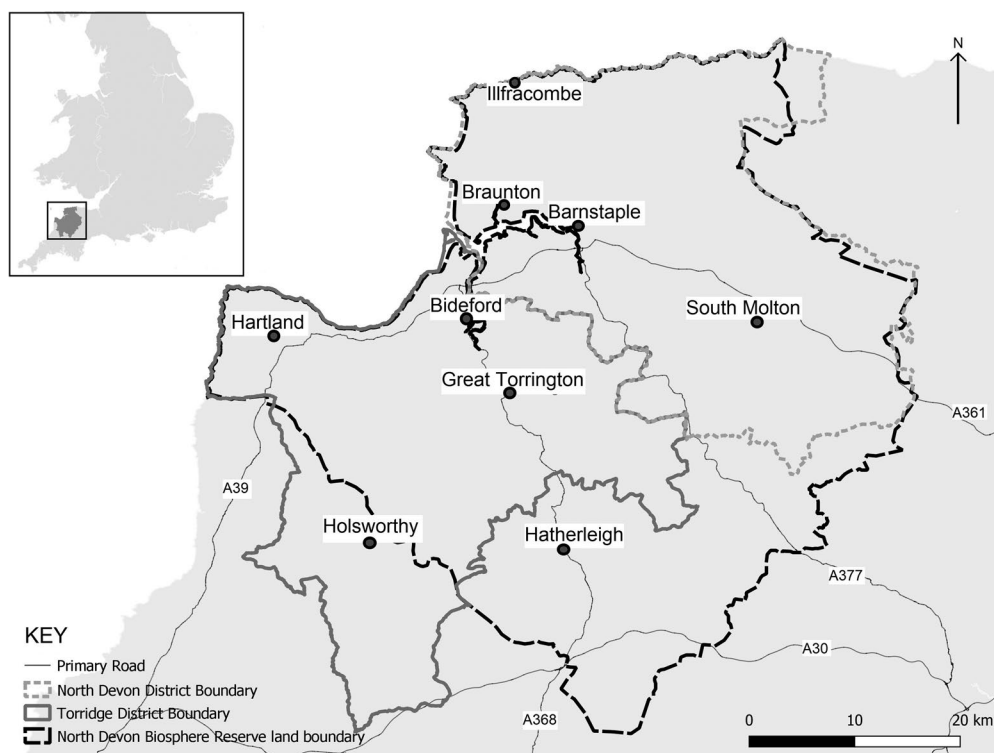


Figure 1. Northern Devon. (Source: England and Wales map: Office for National Statistics licensed under the Open Government Licence v.3.0. Boundaries: MapIt UK licensed under the Open Government Licence v3.0. Roads: © Ordnance Survey OpenMap Local licensed under the Open Government Licence v3.0.).

connected to the rest of the country by mainline railway connections, motorways or airports. Historically, this was an impediment to use of local natural and cultural resources by tourists (Travis, 1993: 23). Although peripheral, the destination is nowadays accessible from the core markets of London and South East England in five hours, and it generates approximately 1million trips and 4.5million visitor nights per year (Visit Britain, 2022).

Second, the destination's natural environments are recognised as a source of enjoyment and sensitive to human impacts. This is manifest in a long-term commitment to protect the destination's ecological and cultural resources which is reflected in regional leadership on sustainable tourism (Coles, 2008). Northern Devon is a palimpsest of designations for the responsible management of natural assets, including: the North Devon Coast Area of Outstanding Natural Beauty (AONB) (designated 1958); North Devon UNESCO Biosphere Reserve (1976); and the Hartland Heritage Coast (1990). Nested within these are: a Special Area of Conservation; Sites of Special Scientific Interest; National Nature Reserves; and Local Nature Reserves. Importantly in the context of EEG, such designations represent a form of capability that have enhanced destination competitiveness, and which have led to further enhancement of local bio-cultural resources. Recognition of Northern Devon's sensitive landscapes underpinned repeated efforts to make tourism in the locality less intensive. In the late 1980s

The Tarka Trail, a 180-mile walking and cycling route, was designed to pull visitors inland with new infrastructure by drawing on iconic local literary heritage (Travis, 2011). Local place branding, such as 'Ruby Country' (from 2002, named after distinctive local cattle), has focused on the landscape, trails and food to encourage sustainable behaviours among visitors.

Sustainability has become deeply embedded in policy and planning across the locality: it is a core principle in the *Northern Devon Tourism Strategy 2018-2022* (North Devon Council & Torridge District Council, 2018a: 5); 'sustainable tourism' is integral to the Local Plan (North Devon Council & Torridge District Council, 2018b: 55); and a 'Sustainable Rural and Visitor Economy' is a key objective for the North Devon Coast Area of Outstanding Natural Beauty (AONB) (2019). Nevertheless, despite the continuity of effort to maintain, and plan for, a sustainable destination, tourism growth has been accompanied by several challenges. While not a form of organised dissent to the overall vision, some citizens have acted individually in ways that have not always been commensurate with contemporaneous policy and strategy. For instance, second home ownership has been historically high (Barnett, 2014) and more recently three towns in the locality have been among the highest rates of Airbnb listing in England (Kommenda *et al.*, 2020).

Against this backdrop, in 2018 the North Devon Biosphere Reserve (with the University of Exeter) initiated work to further advance natural and cultural ('biocultural') heritage as a resource for continued sustainable tourism development. Funded by Interreg France (Channel) England, the Bio-Cultural Heritage Tourism project recognised the importance of tourism in community livelihoods, the pressures that tourism places on local nature and heritage assets, and the need for future tourism production and consumption in designated landscapes to be appropriate in scope, scale and location. Specifically, it focused on whether the benefits of tourism could and should be spread further, especially to less visited areas, by drawing on the locality's bio-cultural resources. A key aspect was to engage with a range of stakeholders to understand their views of alternative trajectories, and to foster a destination-wide approach to decision-making.

Research design and method

A 'decision-support tool' was designed to guide the location of new activities and experiences, and to inform management (Figure 2). The tool, called 'MOPST', and its development are described elsewhere (see <http://hdl.handle.net/10871/129054>; <https://github.com/mopst>). MOPST synthesized input from environmental managers with knowledge of the wider region's natural resources and tourism capabilities. Alongside, three possible scenarios for future tourism development in the locality were identified, which are summarised in Table 1.

Narratives about the potential impacts of each trajectory were co-developed with Biosphere Reserve managers and other experts, in 'living documents' (see Figure 2). To foster greater engagement, they were written in non-technical language and visualised as infographics (see <http://hdl.handle.net/10871/129112>) and maps showing tourism pressures and opportunities under different assumptions (see <http://hdl.handle.net/10871/129076>). Having developed the scenarios and titles pre-COVID-19, in our

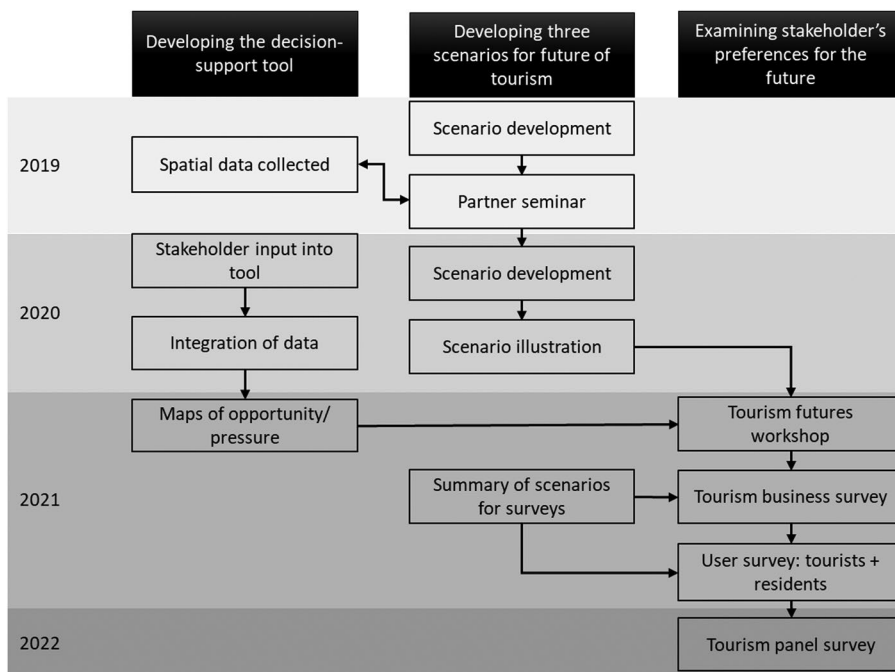


Figure 2. An indicative overview of the research programme. (Source: authors).

subsequent studies, the label ‘Business-as-usual’ was used in the sense of everyday language and usage, to denote that this scenario referred to the continuation of the current nature and levels of tourism production and consumption in 2019. The maintenance of the long-term destination arc -with its policy preference for, and strategic commitment to, progressively even more sustainable development- was articulated through the Responsibility and Custodianship scenario.

Initial work on the decision-support tool and scenarios was completed as the UK exited the European Union (Coles, 2021) and before the first COVID-19 lockdown (March 2020). Originally, the research concerned which, if any, of the three scenarios best captured stakeholders’ preferences for the future development of tourism in Northern Devon. When COVID ‘hit’, further research questions emerged as to whether scenarios developed in the ‘old normal’ remained relevant in a post-COVID-19 world, and whether the pandemic may have triggered a change in preferences for future development?

These questions were investigated in the four studies summarised by Table 2. These culminated in early 2022 prior to the final removal of restrictions for England in February. Detailed accounts of the studies are available elsewhere (<http://hdl.handle.net/10871/129075>, <http://hdl.handle.net/10871/129162>, <http://hdl.handle.net/10871/129189>, <http://hdl.handle.net/10871/129190>).

Briefly put, the first study involved a two-hour online workshop with nine tourism policy-makers in June 2021 (Table 2). Taking the form of a discussion group, we presented the scenarios, narratives and images; maps of tourism pressure and opportunity; and facilitated a discussion on the future of tourism in Northern Devon with

Table 1. Brief descriptive summary of the three scenarios for Northern Devon. (*Source:* authors).

Scenario name	Summary
Business-as-usual	In this scenario, tourist consumption still mainly focuses on popular, 'honey pot' sites. The natural environment is appreciated, but visitor pressures lead to its gradual deterioration at key sites. Destination managers try to protect nature and heritage, but the costs of maintenance are growing, despite effective management at some sites. There are seasonal peaks and troughs in visitor numbers and spend, impacting business and creating seasonal (un)employment. Natural and cultural heritage is still accessed by car leading to congestion at peak times. There is some outward migration of local people as property prices rise. Local distinctiveness is slowly fading in some towns and villages.
Less Regulation	In this scenario, profit is the motivating factor and there is less regulation of the private sector in tourism. This leads to over-development of the built environment and a loss of habitats. Pressure to build more tourism facilities in protected landscapes rises. As natural and cultural heritage becomes more commodified, profit increases for some businesses, but local businesses do not benefit proportionately. New products and offers for tourists lead to rising visitor numbers and increased pressure on the natural environment. Social divides between tourists and residents become more apparent.
Responsibility and Custodianship	In this scenario, stakeholders take shared responsibility for the natural environment. This is enhanced by pro-environmental behaviours and financial contributions from visitors and local businesses. More visitor spend is retained in the local economy and new business opportunities emerge from a vibrant local culture and improved natural heritage. The economic benefits of tourism are more evenly spread across the destination, year and local communities. There are more green travel options and reduced congestion. Visitors understand the impacts tourism has on the locality, and are better informed about the range of sites and activities available.

reference to COVID-19. This was followed by two stakeholder surveys: an online survey of tourism businesses (funded by Torridge District Council); and a site user survey of tourists and residents visiting key locations within the Biosphere Reserve. In each, short written descriptions of the scenarios were used, employing bullet points; participants were asked to rank their preferences in order. The scenarios were given short descriptive titles (e.g. 'Business-as-usual') in the first three studies. Finally, an online panel survey of tourist preferences for the future of Northern Devon was conducted. This was completed by respondents who had stayed overnight in Northern Devon in 2021. The sample was structured by age, gender, ethnicity and socio-economic group. Participants were asked to rank the scenarios but, after piloting and discussion with stakeholders, the scenarios were presented without their short titles to eliminate potential bias stemming from the names.

Ethical approval for the research was obtained from the University of Exeter Ethics Committee (workshop, business survey and panel survey) while, in partnership working, North Devon Biosphere Reserve led the user survey (including the university team). In all studies participants provided written informed consent prior to enrolment.

The next section presents the main results of the four studies. The subsequent discussion then provides a synthesis of commonalities and cross-cutting issues.

Results

Tourism futures workshop

Taking place over a year after the pandemic was declared, this workshop brought together nine policy-makers and planners. At the time, England was in the third

Table 2. Summary of the four empirical studies. (Source: authors).

Date	Research intervention name	Delivery method	Sampling	Stakeholder focus	Length	N=	Presentation of scenarios	Approach to analysis
June 2021	Tourism Futures workshop	Online workshop/ focus group	Purposive	Regional policy makers, planners and experts	120 minutes	9	Verbal presentation, images and GIS maps	Thematic analysis
August 2021	Northern Devon Nature Tourism Business Survey	Online and postal questionnaire	Stratified, purposive	Tourism businesses in Northern Devon	30 questions	56	Descriptive title and short written summary	Descriptive statistics (SPSS)
August 2021	North Devon Biosphere User Survey	In-person questionnaire at 10 key sites in the Biosphere Reserve	Quotas at sites	Residents	22 questions	125	Descriptive title and short summary of scenarios read to participants	Descriptive statistics (SPSS)
January 2022	Northern Devon Tourism Panel Survey	Online panel questionnaire	Stratified	Non-residents (tourists and day-visitors) Tourists who had overnight stay in 2021	32 questions	299 497	Short description of scenarios given, without descriptive titles	Descriptive and inferential statistics (SPSS)

phase of release from its 2021 lockdown (HMG, 2021); the two further anticipated stages to total removal were the subject of much public discourse and uncertainty (Walker & Belam, 2021). Unsurprisingly then, there was a degree of equivocation in responses from public sector actors who were cognisant of detailed conditions and cases in the destination, and of the potential for changing government policy to shape recovery.

When posed with the question about what they saw as the longer-term future for tourism in Northern Devon, participants started by discussing current tensions between supply and demand. Likely tourism futures were signalled through what participants expressed as opposing development trajectories (Table 1). As one respondent put it, 'What we're seeing in [the coastal strip] is two completely contradictory trends'. Broadly-speaking, the tensions were between growing tourism accommodation and facilities versus maintaining the environment. Implicitly, participants juxtaposed the economic benefits of additional development from the Less Regulation scenario with preserving the high quality of the environment from the Responsibility and Custodianship scenario (Table 1). As one participant put it:

That quality of environment is the thing that people want to come for and that pressure of over-development -and the risk of that- is something that I think is going to be a real challenge going forward. Clearly there's been a reaction to COVID and the staycation boom, which we don't know whether that's a short-term trend, or whether or not it's going to be something that continues into the long term.

Participants ranked the scenarios in order of preference using a polling app. Responsibility and Custodianship emerged as the first preference. In the dialogue about this result, some participants indicated that, in ordering the options, they were uncomfortable that something as complex as the future may be reduced to a single preference. Acknowledging that the scenarios distilled complex ideas, they discussed and then ranked a hybrid scenario which drew on tactically-relevant features from the three trajectories. This emerged as the second most-popular option followed by Business-as-usual and then Less Regulation. The appeal of a hybrid was explained as:

(T)aking the best of all of those bits really isn't it? It's about deregulating where you can, to allow opportunity and growth, where it's appropriate, where you think you can streamline. But also, building on that, the benefits of that more sustainable approach and making some of the Business-as-usual bit. If we're in a perfect world, that would be what we would try and do....

Nature tourism business survey

The business survey (n=56) was targeted at nature-based tourism businesses; enterprises for whom nature was a principal aspect of their value proposition and business model. The (low) sample size was mainly a function of multiple COVID-19-related postponements (see <http://hdl.handle.net/10871/129075>). Although the sample size defies more granulated analysis, there emerged a clear and unequivocal preference for the Responsibility and Custodianship scenario (73.2% ranked it first) alongside an emphatic rejection of Less Regulation. Almost three quarters of respondents (72.3%) ranked Business-as-usual as their second preference, and 85.1% recorded Less Regulation as their third and least-favoured scenario (Table 3).

Biosphere reserve user survey

Following the lifting of all public health restrictions, an extensive survey (n=424) was conducted at key sites within the Biosphere Reserve. Participants comprised residents (n=125) and non-resident site users (n=294). Scenario preferences stated by these groups were strikingly similar (Table 3). Approximately two thirds of residents (67.0%) and non-residents (65.0%) ranked Responsibility and Custodianship as their preferred scenario; around one third preferred Business-as-usual; and very few respondents (<5%) ranked Less Regulation as their preferred scenario (Table 3). Similarly emphatic results were evident in terms of the second and third choices. For non-residents and residents, the modal second preference was Business-as-usual (64.7% and 63.0% respectively) while the modal third choice was Less Regulation (94.1% and 91.5%).

Tourism panel survey

The previous survey was intended to capture user responses *in-situ* and the sub-samples were not representative of either the visitor or resident profile of Northern Devon (nor was the sampling strategy designed in this way). In view of likely place attachment and an awareness of various place designations, residents' preference for Responsibility and Custodianship may have been expected. Conversely, the same preference among non-residents raised the question of whether the results were in some way a function of the completion of the questionnaires *in-situ* in high quality natural environments.

As such, a final panel survey covered tourists who had holidayed in Northern Devon in 2021. Representative of the population in England (n=497), the results followed a similar pattern of preferences. The modal first choice was for Responsibility and Custodianship (42.7%), followed by Business-as-usual (33.0%). Unlike the other two surveys, almost one quarter (24.3%) of panel survey respondents favoured the Less Regulation scenario. In terms of second and third preferences, the modal values for these were respectively Business-as-usual (48.5%) and Less Regulation (47.5%).

Discussion

Across these four studies, there was broad consensus in favour of a (more) sustainable future for tourism in Northern Devon. With respect to the research questions, among each stakeholder group the first preference for the future was for Responsibility and Custodianship. In other words, the most preferred scenario was also the most consistent with the destination's long-term arc towards ever greater sustainable development. Among the three surveys, support ranged from 72.3% to 42.7% of participants. While the upper value may reflect the sample composition in the business survey, Responsibility and Custodianship was the unanimous first choice (Table 3). Business-as-usual -or a resumption of the nature and level of tourism production and consumption in 2019- was the routine second preference, while Less Regulation was the third.

This continued preference represents a form of a path dependency conditioned by destination-based legacies such as landscape designation and sustainable tourism infrastructure. Admittedly, the high popularity of Responsibility and

Table 3. Scenario preferences stated by stakeholders in three questionnaire surveys. (Source: authors - scenario descriptors refer to Table 1).

Scenario Descriptor	Preference rank (choice)	Study							
		2. Business Survey		3. User: Non-resident		3. User: Resident		4. Panel Survey	
		Count	%	Count	%	Count	%	Count	%
Business-as-usual	1	11	23.40%	74	33.50%	34	31.50%	164	33.00%
	2	34	72.30%	143	64.70%	68	63.00%	227	45.80%
	3	2	4.30%	4	1.80%	6	5.60%	106	21.30%
Less Regulation	1	2	4.30%	8	3.10%	3	2.50%	121	24.30%
	2	5	10.60%	7	2.70%	7	5.90%	140	28.20%
	3	40	85.10%	241	94.10%	108	91.50%	236	47.50%
Responsibility and Custodianship	1	34	72.30%	143	65.00%	73	67.00%	212	42.70%
	2	8	17.00%	66	30.00%	32	29.40%	130	26.20%
	3	5	10.60%	11	5.00%	4	3.70%	155	31.20%

Custodianship may have been influenced by public messaging to ‘build back better’ through a ‘green recovery’ (HMG, 2020). Conversely, there was not greater support for the other scenarios despite their featuring in separate policy discourse. Greater preference for ‘Business-as-usual’ would have reflected national ambitions for the return of tourism to 2019 levels by 2023 (DDCMS 2021), or what Martin (2009: 22) may have called ‘more of the same’. Stronger preference for Less Regulation may have been expected because of frequent reports of negative, almost existential threats to UK tourism businesses during the pandemic (e.g. House of Commons (HoC), 2021).

Put another way, the pandemic did not act as a trigger for a radical change in preference for destination trajectory. Quite the opposite. Indeed, there has been further tangible evidence of strategic support for extending the existing arc post-dating our work. The subsequent announcement of a ‘Nature Tourism Agenda’ (Torridge District Council, 2022) reiterated stakeholder preference for more sustainable tourism development. The pandemic did not result in the sort of tactical expediency and short-termism observed in other studies (Anton Clavé & Wilson, 2017; Gill & Williams, 2014). Nor was there a desire to settle for the 2019 view (i.e. committed to sustainable tourism development but requiring progress to achieve it) or ‘lock-in to a stable equilibrium’ (Martin, 2009: 10). Instead, the evidence points to an appetite for even more responsible tourism development. From a perspective of (destination) strategy, this raises the question of whether the continued preference for the former path represents an acceptable form of conservatism and, moreover, how a relatively static view sits in relation to literature that extols dynamism, change and malleability.

In terms of the conceptualisation of destination development pathways, we argue that the data reveal a key difference to prior studies. They illustrate that an existing trajectory was not perceived as a shortcoming (Brouder, 2020), somehow restrictive or constraining, but rather that it was a virtue, almost a form of ‘reproductive agency’ (Baekkelund, 2021) or a ‘positive path dependency’. The existing destination path was a source of resilience and perceived as a ‘known entity’ at a time of great uncertainty. The consensus appears to have been that what was attempted in the past was a suitable guide to the future. Whatever the merits of adopting this preference in future strategic management, its prolongation stemmed from place-based leadership (Grillitsch & Sotarauta, 2020), originally rooted in landscape designation and protection. Extension

did not result from frustrated institutional objectives, inertia or obstruction of change (Baekkelund, 2021). There was not a 'crisis of sustainability', nor was there 'mindful deviation' (Garud & Karnøe, 2001) towards altogether new or radically-different path development. Instead, as a trigger event, the pandemic provided space for reflection and the 'mindful continuation' of a path-dependent trajectory.

Conclusion

This paper has examined how, during the COVID-19 pandemic, three potential scenarios for tourism development were perceived by major stakeholder groups. In Northern Devon, as in many other destinations, there was a longstanding commitment to environmental stewardship and sustainable destination management. Far from 'building back better' or embarking on entirely new path-creation, there was substantial support for the reaffirmation of an arc of development first started several decades earlier.

The paper adds to the critique of early opinion pieces as often lacking appropriate empirical substantiation or grounding (Yang *et al.*, 2021). While it furthers our understanding of the pandemic and its effects on local tourism development, its major contribution is to propose an additional framing of trigger events as a moment for 'mindful continuation'. COVID-19 prompted a reassertion of existing trajectories for tourism development in the locality. Trigger events do not necessarily have to precipitate overt action or catalyse tangible change (for instance, to structures, organisations, businesses or institutions); they do not automatically have to induce new path-creation; and path dependency should not necessarily be viewed negatively. Recast through EEG, earlier opinions suggesting that the pandemic could, or indeed should, lead to a transformation of tourism were at best limited by their adopting global or national perspectives, at worse by their failure to recognise that the desire for beneficial change already existed at the local level in many cases.

This reading of the potential resilience of extant trajectories in the face of crisis has wider implications. For similar destinations -such as other biosphere reserves and protected landscapes- with established, long-term approaches to sustainable development and continued stakeholder support for their trajectories, the deliberate and continued dependency on a particular path may represent a positive, stabilising factor during crisis events. For destinations where stakeholders strongly disagree about the direction of its evolution -for instance urban geographies where overtourism has resulted in conflict (Dodds & Butler, 2019)- consciously continuing to assert pre-crisis plans and demands may have tactical benefits for stakeholder groups, even if the destination's overall strategy is contested. Although grounded in tourism, the study's central finding -the value of deliberative and 'mindful continuation' of existing trajectories when faced with crisis conditions- has wider resonances for localities and regions reliant on other sectors and industries. Theorising further, there is no reason to suppose that in long-term development arcs, the disruption presented by a crisis does not provide an opportunity to reaffirm positive, yet existing evolutionary trajectories for a range of geographies. Continuity, not just transformation, has value.

Of course, further studies of a similar nature would provide welcome corroboration of this theorisation. In the context of this paper, there remains an entirely separate

question about whether the locality has the resources and capabilities to follow its preferred pathway, in particular how strategic leadership can be used effectively to accelerate progress. In the context of implementation, future research may also include consideration of the policy-makers second preference for a hybrid scenario. As a solution forged in discussion, this combined the most alluring elements from the different scenarios (i.e. 'cherry picked') but was not grounded in the participatory research as were the others, nor was its feasibility studied. Finally, rather than conducting retrospective investigation of past scenario preference, further research may be more productively targeted in this locality, as it is in EEG more generally (Henning, 2019), in continuation studies and the incremental piecing-together of a fuller, longitudinal record of destination development. The trajectory of a destination and the impact of crises events of the magnitude of the COVID-19 pandemic, will only be told with the fullness of time.

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No potential conflict of interest was reported by the authors.

Expanded data availability statement

Research intervention/ output	Data Availability Statement
Modelling and mapping tourism pressures and opportunities	Report on the participatory GIS methodology and outputs available on Open Research Exeter: http://hdl.handle.net/10871/129054
Pressure and Opportunity maps for North Devon Biosphere Reserve	The data that support the findings of this study are openly available on Open Research Exeter: http://hdl.handle.net/10871/129076 .
Three Scenarios for the future of Tourism in North Devon Biosphere Reserve	The data that support the findings of this study are openly available on Open Research Exeter at: http://hdl.handle.net/10871/129112
Tourism Futures Workshop	A summary of method and the findings are openly available on Open Research Exeter at: http://hdl.handle.net/10871/129162 A transcript of the workshop is not publically available as it contains information that identifies participants. Contact corresponding author (TJW) for access to excerpts.
Northern Devon Tourism Business Survey 2021	A report on research, aggregate findings and a copy of the survey instrument are available on Open Research Exeter: http://hdl.handle.net/10871/129075 The data that support the findings of this study are available from Torridge District Council. Restrictions apply to the availability of these data. Data are available from corresponding author (TJW) with the permission of Torridge District Council.

North Devon Biosphere Reserve User Survey 2021	<p>A copy of the survey instrument and information about the methods are available on Open Research Exeter: http://hdl.handle.net/10871/129189</p> <p>The data that support the findings of this study are available from North Devon Biosphere Reserve. Restrictions apply to the availability of these data, which were used under license for this study. Data are available from corresponding author (TJW) with the permission of North Devon Biosphere Reserve.</p>
Tourism Panel Survey 2022	<p>A copy of the survey instrument and information about the methods are available on Open Research Exeter: http://hdl.handle.net/10871/129190</p> <p>The data that support the findings of this study are available from the corresponding author (TJW). Restrictions apply to the availability of these data. Data are available from corresponding author (TJW) with the permission of North Devon Biosphere Reserve.</p>

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Data availability statement

The studies on which this paper is based are available in aggregate form on Open Research Exeter (ORE), deposited at <https://ore.exeter.ac.uk/repository/>. The data supporting the studies may be made available to third parties, subject to written authorisation and appropriate permissions being secured. Please contact t.j.wilkinson@exeter.ac.uk if you are interested in obtaining access to the data.

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