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# HISTORICAL EVOLUTION AND SPATIAL DEVELOPMENT OF TOURISM IN CUBA, 1919-2017: WHAT'S NEXT?

## Abstract

The main objective of the article is to analyze the historical evolution and spatial development of tourism in Cuba, from its beginnings in 1919 to the present day (2017). The socio-economic and political history of Cuba, in particular, during the second half of the 20<sup>th</sup> century, was linked, among other aspects, with the development of tourism, and was very closely dependent on relations with the United States of America. The potential of Cuban tourist resources and the changes in the tourist markets are analyzed, in particular, the changes in the markets which occurred after 1963 with the prohibition of US citizens from traveling to Cuba, ordered by the government of President JF Kennedy. These regulations motivated the use of the Canadian, European and Latin American tourism market to develop this sector. Changes in Cuban economic dynamics are also highlighted with the current development of small and medium-sized private providers of lodging, catering and tourist transportation services, amongst others, whose effects in improving the quality of life of the Cuban population are still unknown.

**Keywords:** Cuba, Cuban tourism, tourism planning, tourism landscapes

## 1.- INTRODUCTION

Cuba is an interesting and complex tourist destination because of its great quantity and variety of attractions and tourism resources, its privileged location in the geographical context of the Insular Caribbean and proximity to Central, South, and North America, and its geopolitical importance over the last 59 years, since the Cuban revolution of January 1, 1959. Adding to this complexity is its relationship with the United States (U.S.); after half a century, the activities to re-establish diplomatic relations under the administrations of Cuban President Raul Castro (2008 – present) and U.S. President Barack Obama (2009 – 2017), opened up new possibilities for U.S. citizens to travel to Cuba. Though the attempt to normalize relations was brief and under the new U.S. administration of President Donald Trump, travel restrictions were once again imposed, the short-lived resumption of the relationship shifted the narrative of Cuba as a potentially viable destination for tourists from across the globe. In addition, the future prospects of Cuban tourism go beyond the emerging US market. The promotion in the Canadian market continues, as well in European and Latin American countries that traditionally visit Cuba, while seeking new emerging markets in Europe and Asia.

In this regard, tourism as a source of foreign currency now occupies second place in the Cuban economy, with an annual average growth of 11% between 1990 and 2007 and then 6%, more adjusted to global standards, up until 2015. In this international context, Cuba hit three million visitors and 65,600 hotel rooms for the first time in 2015. In parallel, the private sector also grew to 16,839 rental houses (*casas particulares*) and 1,700 in-home restaurants (*paladares*), which are tourism facilities under private management that offer high-quality competitive products on the global tourism market (Castro & Guilarte, 2016).

Based on the above, the main objective of this article is to identify and characterize the evolution of tourism in Cuba and its potential for future development. To this end, we analyze its historical conceptualization, the spatial planning process of how the tourism landscape has evolved, and finally, the future perspectives and challenges for Cuban tourism, in order to then present possible scenarios for the development of this activity.

### **1.1.- Overview of Tourism Supply**

The Cuban archipelago consists of the island of Cuba, the largest of the Antilles stretching 1,138 km from east to west, La Isla de la Juventud, and over 4,000 small islands that surround the main island to the north and south. Altogether, Cuba has a wide variety of natural and historical-cultural resources that can facilitate the development of tourism.

The country's Tropical climate, insular nature, and particular geological-geomorphological evolution mean that Cuban landscapes enjoy a great natural diversity and complexity. Plains comprise the predominant landscape and there is a wide distribution of karst landscapes and a more complex altitudinal differentiated landscapes than in the continental areas (Salinas, Ed., 1996, p.215). As a consequence of the above, numerous beautiful long beaches with fine white sands (over 400 km) combine with low sandy coasts composed by biogenic sediments from adjacent coral reef where the waters are warm and transparent; there are spectacular sea beds with varied flora and fauna and extensive coral reefs, all of which increase the diversity of the landscape and allows for a variety of recreational activities both on land and at sea.

Cuba's flora, with over 7,000 species of plants (approximately 2.2% of the world total) makes it one of the 10 richest biological regions in the world, with an endemism of over 50% (the highest in the Caribbean) and more than 900 species in different categories of vulnerability or in danger of extinction (Chamizo et al., 2012, p. 48). As for fauna, there are around 13,000 species, of which 10% may be on the verge of extinction (Capote, Mitrani & Suarez, 2011, p. 3). Some 20% of the national territory falls under one of the protection categories in the National System of Protected Areas (González et al., 2012, p.154; CNAP, 2004, p.27). The above comprises an important resource in the face of growing demands for nature-based tourism

In addition to natural resources, the Cuban archipelago has important socio-cultural resources associated with the diversity of racial backgrounds that resulted from colonization more than five centuries ago, as well as the unique influence of socialism that was brought about through the strong relationship with the U.S.S.R. during the cold war. This is the source of the great socio-cultural wealth of the Cuban people, reflected in their habits, manner of speaking and dressing, music, hospitable character, religious practices, and gastronomy (Rivero de la Calle, 1992, p.39). Culture is also reflected in the architecture of its cities, with styles ranging from Colonial to Soviet, in a tropical climate: a landscape found in very few places. To this end, memorialization and museums to the Cuban Revolution are also popular attractions; more than 4.5 million people have visited the Che Guevara Mausoleum in Santa Clara (300 km from Havana), where Ernesto "Che" Guevara was laid to rest in 1997. Of the visitors, more than 3 million are foreigners, which "confirms the universal recognition" of the "revolutionary legacy" left by the Argentine-Cuban leader (García Santos, 2017). As well as this, there is the intersection of natural and cultural resources that are reflected in the farming and production of tobacco, sugar, coffee and rum.

The tourism landscape centers on some of the remnants in the landscape that reflect the political results of the U.S. embargo and effects of the Special Period, for instance the old cars, called "*almendrones*," that are often photographed in Havana (mainly makes such as

Ford, Chevrolet, Cadillac, Dodge). These cars have been kept working by their owners up to the present day out of necessity for their utility, though they are increasingly also used by the tourist sector.

## **2.- HISTORICAL DEVELOPMENT OF TOURISM IN CUBA**

The emergence and evolution of tourism in Cuba correspond to the country's economic and socio-political history. The first half of the twentieth century like many countries, Cuba was generally characterized, until the mid-20<sup>th</sup> century, by the absence of a defined policy for tourism development. Several authors point to the existence of three or four defined stages of tourism development in Cuba, depending on the criteria are used to divide them (Villalba, 1993; García, 1998, 2005; Salinas & Mundet, 2000; Salinas, 2009; Salinas & Salinas, 2016). In this case, this paper identifies two periods, before and since the Cuban Revolution, which can in turn be subdivided into further stages.

### **2.1.- Pre-revolutionary period (1902-1958)**

The first attempt to organize tourism activity was made on August 8, 1919 with the official creation of the National Commission for the Promotion of Tourism and therefore, it can be argued that tourism emerged as an official economic activity in Cuba around this time. This resulted from the boom of the national economy due to the rise of sugar prices on the international market after the First World War (1914 – 1918). Additionally, alcohol prohibition in the U.S. (legally enforced between 1920 and 1935) contributed to hedonistic travel to other countries, and served as a great boost for U.S. tourists to Cuba. These factors led to a continuous growth in the entry of foreign visitors which was maintained, according to the statistical information available, until 1928. During this period, Cuba became the Caribbean's main tourist destination with 31,566 tourist arrivals for the 1924-1925 season. Comparatively, the Caribbean as a whole received an estimated 88,200 tourists and the islands near the U.S., such as the Bahamas and Bermuda, received almost none. That is, almost 36% (or a third) of the total Caribbean tourism market was traveling to Cuba. This high level of tourism was also driven, in this first quarter of the twentieth century, by an interest in making Cuba not only economically and politically dependent island nation, but also creating cultural dependency on the U.S. (Villalba, 1993).

The Second World War (1939 – 1945) meant that tourist arrivals declined around the world. However, with its end in 1945 there was yet another increase in tourist travel to Cuba, as well as a healthy market for sugar exports. In the early 1950s, Cuba remained the Caribbean's leading tourist destination. With over 6,500 rooms and a capacity of 12,067 beds, Cuba received 188,000 tourists in 1951, representing 26.4% of all visitors to the Caribbean and double that of the second most important destination in the region, Jamaica (claiming 13.1% of the Caribbean tourism market). In 1957, tourism was the second largest industry for Cuba behind sugar with regard to total exports. During these years, the U.S. was the main emitting market, contributing to approximately 88% of the total number of visitors; this was the beginning of "industrial or modern tourism" in Cuba (Maribona, 1959, p.38).

There were two important factors that influenced tourism development at this time: first, an increase in hotel investments resulting in a development boom between 1952 and 1958; and second, a rise in gambling and the opening of numerous casinos, mainly in Havana. Over

these years, hotel construction led to an increase in accommodation capacity, which increased capacity significantly. Important hotels built in Havana at this time included: the Habana Hilton, completed in March 1958, today known as the Habana Libre Hotel; the Habana Riviera, built in 1957 under the management of mafia boss, Meyer Lansky; and the Hotel Capri, another investment belonging to the Italian-American mafia (Cirules, 2006); the Oasis and the International Hotels were built in the spa town of Varadero, as well as work beginning on the Marina Barlovento, west of Havana. To this end, 1957 saw the highest number of arrivals, with 272,265 visitors, of whom 85% were North Americans attracted in large part by the denigrating publicity offered by Havana as a center for games and prostitution in the Caribbean.

With the development of tourism infrastructure and growing tourist arrivals, there were also concerns with the type of development, ownership, and organization of the tourism industry. Thus, this period was characterized by “a lack of foresight in management and administration, low per-tourist income, short stays, and a poor supply based essentially on gambling, vice and prostitution” (Villalba, 1993, p.104). This was particularly concerning because the properties belonged to the elite Cuban ruling classes and the Italian-American Mafia who were making plans to convert Havana into a large gambling den and brothel for a certain type of U.S. clientele (Villalba, 1993). These plans and actions, supported by the dictator Fulgencio Batista, aroused repudiation amongst students, intellectuals, artists and workers, which triggered a popular awareness of the need for a radical social and political change in Cuba.

## **2.2.- Revolutionary Period (1959-present)**

On January 1st 1959, after two years of intense fighting in the mountains, plains, and cities, former President Fidel Castro and his “guerrillas” finally conquered the City of Havana, bringing down the government of dictator Fulgencio Batista (1952 – 1958). Among the initial measures implemented by the revolutionary government was the Agrarian Reform Laws, which granted land tenure to the peasants who had been working as tenant farmers. The Agrarian Reform Laws are reflective of the socialist nature of the new government’s policies that sought to redistribute resources and property to address the social and economic inequality that had increased under Batista. For example, the first law (1959) reduced the existing properties to 400 hectares and the second law (1961) further limiting properties to 67 hectares. As such, 40% of arable land was expropriated from U.S. companies and large private landowners while in the second stage, another 30% of land passed into the hands of the state. Thus, the state attained possession of 70% of the arable land, while the other 30% remained in the hands of private farmers (García, Tejeda & Hernández, 2014).

In the context of tourism, the compulsory expropriation of property included, for example, the recently built Hotel Hilton in Havana, which was converted into Fidel Castro's headquarters for several months. The seizure of property from U.S. companies, without having to pay any compensation, was one of the main reasons why the U.S., under the administration of President John F. Kennedy, signed a decree establishing an economic, financial, and commercial embargo, or blockade, against Cuba. Upheld by ten different statutes, the U.S. embargo against Cuba – which still exists to the present – also included a travel ban to the island by U.S. residents.

Despite the U.S. embargo (blockade for the Cuban people) against Cuba that has in part contributed to Cuba’s underdeveloped economy, Cubans benefit from important social

indices equal to, and in some cases higher than, more developed economies in capitalist countries. Among these achievements include the average life expectancy is 78.45 years (Oficina Nacional de Estadística e Información, 2015), a general free health system for the entire population, including hospitalization and dental treatment, and a free education system from primary to university level. Likewise, illiteracy was eliminated in 1961 and has achieved significant advances in arts, culture, sports, and science (United Nations Educational, Scientific, and Cultural Organization [UNESCO], 2015). Many of these achievements have become part of the attractiveness of Cuba as an international destination.

### **2.2.1.- 1959 to 1976**

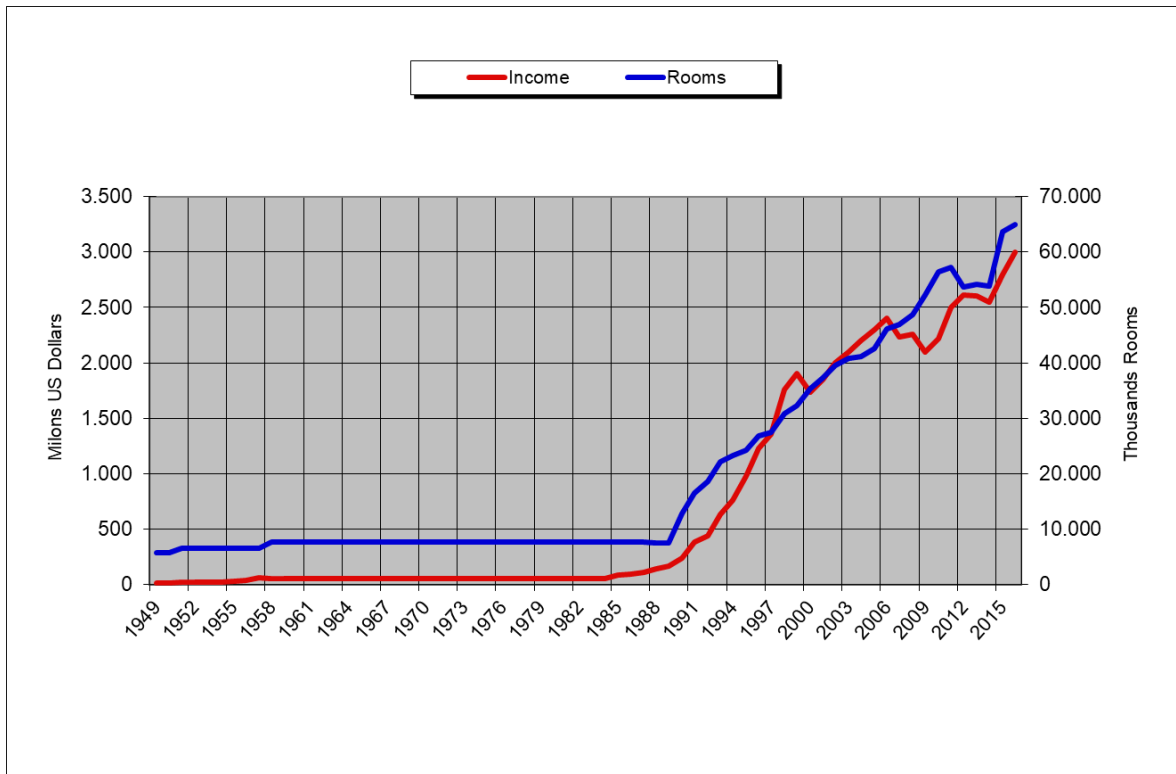
After the revolution, there was criticism of the tourism development that dominated prior to the revolution that had resulted in undesirable impacts such as prostitution, gambling and drugs (Sharpley & Knight, 2009; Taylor & McGlynn, 2009; Villalba, 1993). In this regard, there was a complete turnaround in the organization, marketing, and spatial distribution of tourism activities. In March 1959, Act 270 established free access to all beaches and coastal areas for everyone, since Cuban coasts had been partially privatized, especially the beaches.

In November of the same year, the National Tourism Industry Institute (INIT) was created with former President Fidel Castro serving as the first president. The INIT was responsible, among other organizations, for promoting tourism, implementing development plans for this activity, and protecting the natural and cultural heritage of the nation relevant to the purposes of tourism. In the 1960s, the reception of foreign tourists displayed a decreasing trend, an expression of the complete dependence on the U.S. tourism market at that time.

The U.S. embargo prevented other countries from doing business with Cuba (i.e., if a country wanted to do business with the U.S., they could not do business with Cuba). Additionally, there was a perception of safety moving into the cold war, Cuba was seen as a satellite of the USSR and the communist world. A vision that was particularly exacerbated during the Cuban missile crisis in October 1962. This also influenced, to a certain extent, the decrease of international tourism.

From 1970 onwards, small groups of tourists began to arrive from Canada, some Latin American countries, and Eastern European countries who were motivated by political interests and solidarity. This emergence of the Canadian market in general began in 1973 with the definition of a general policy of tourism development by the Council of Ministers, aimed at continuing the development of all types of this tourism and receiving financial support based on income deriving from this concept.

### **Figure 1. Evolution of tourism income and the number of hotel rooms in Cuba, 1949-2016**



Source: Figueras, M. A. (2000). " Turismo y Desarrollo. Las recientes experiencias cubanas y sus proyecciones al futuro". *Business Tips on Cuba*, May 2000: p. 32-38.

Salinas, Er. (1998). "Turismo en Cuba. Desarrollo, retos y perspectivas". *Estudios y Perspectivas en Turismo*, Vol. 7, No. 1: p. 151-164.

Villalba, E. (1993). *Cuba y el turismo*. La Habana: Editorial de Ciencias Sociales.

National Bureau of Statistics and Information, 2016

### 2.2.2.- 1977 to 1993

In November 1976, as a result of the restructuring of the country's administrative institutions, all tourist activity was centered around a specialized body with the creation of the National Institute of Tourism (INTUR), whose role was to plan and implement tourism development policy. Its main objective was to boost international tourism while continuing to serve domestic tourists by participating more actively in the marketing process and ensuring human resource training for workers in order to raise service quality.

During this phase tourism was still considered a source of negative social impacts in ideological and cultural terms, mainly due to the patterns of consumption associated with mass tourism historically. The Cuban government did not actively stimulate its development, especially with regard to Western markets. Likewise, the centralized state administration could not always provide agile or localized solutions to the different problems that arose as a result of tourism development, which required the participation of experienced foreign entrepreneurs with an interest in working in Cuba. Decree Act 50 was enacted in February 1982 that regulated economic associations between Cuba and foreign entities and was at the time considered an instrument for dynamically expanding exports and tourism.

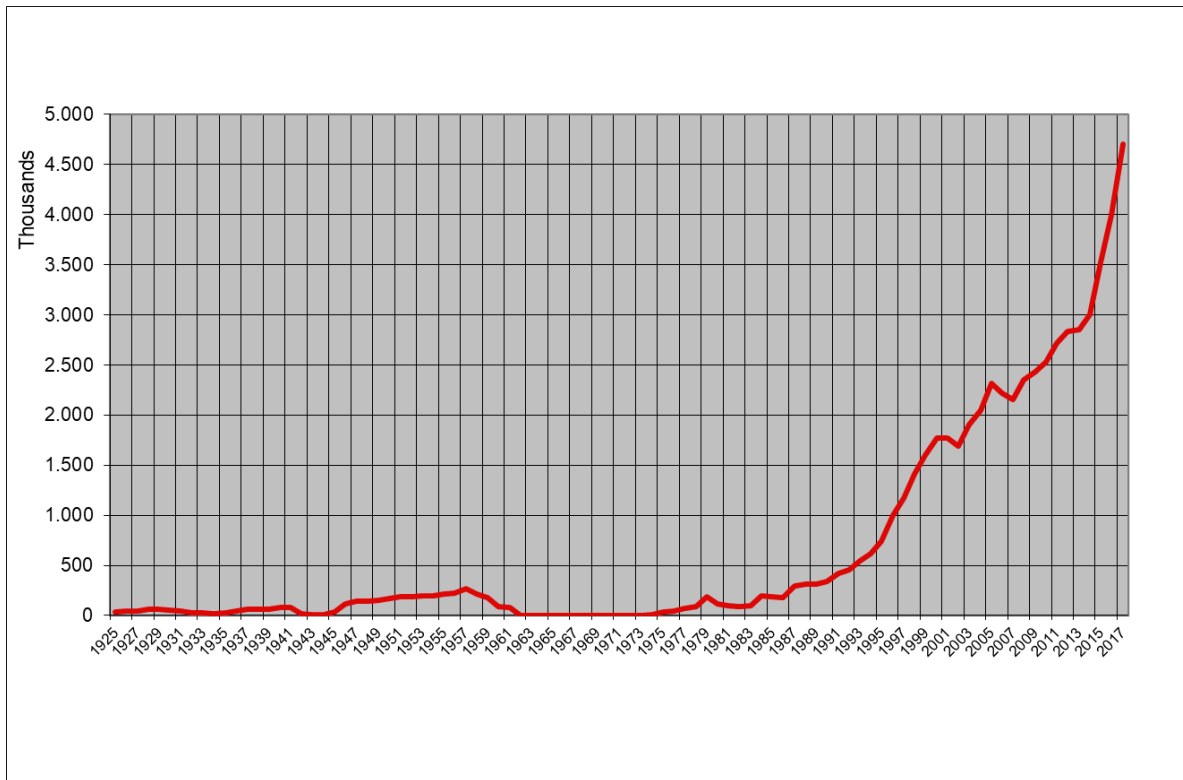
This legislation resulted in the creation of mixed companies – Cuban companies associated with foreign capital – as well as joint-use of facilities and an increase in commercial and tourism firms interested in working in areas that Cuba had less experience such as

management and administration, market research, financing, and investment policy. The ability to draw from foreign capital heralded important investments and resulted in new tourist regions including the northern provinces of Camagüey and Holguín, Santiago de Cuba (Baconao Natural Park), the Jardines del Rey island group, and large areas of Varadero.

However, the fall of socialism and subsequent disintegration of the Soviet Union (i.e., U.S.S.R., Eastern Bloc) represented a severe blow to the Cuban economy, which lost 80% of its exports and imports and a 35% decline in GDP. This forced the Cuban government to consider tourism as a possible alternative for economic recovery (Garcia, 2005). These very difficult socio-economic conditions, also called the “Special Period in a Time of Peace” (henceforth, Special Period), saw widespread construction of new hotel capacities and supplementary hotel services, the development of supporting tourism infrastructure, and increased participation of foreign capital in the tourism sector. On one hand, these new investments by the state eased the entry of foreign businesses operating and managing hotel groups, improving the quality of tourist services. On the other hand, this attracted large international tour-operators interested in Cuba as a new tourist destination in the Caribbean. The result of this commitment to tourism was an increase in the number of tourists, overnight stays, and hotel facilities. From 1,634 visitors in 1970, the number increased to 129,591 in 1980, and 326,300 in 1989 (see Figure 2).



**Figure 2. Tourist arrivals in Cuba, 1925-2017**



Source: Figueras, M. A. (2000). "Turismo y Desarrollo. Las recientes experiencias cubanas y sus proyecciones al futuro". *Business Tips on Cuba*, May 2000: p. 32-38.

Salinas, Er. (1998). "Turismo en Cuba. Desarrollo, retos y perspectivas". *Estudios y Perspectivas en Turismo*, Vol. 7, No. 1: p. 151-164.

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Republic of Cuba National Bureau of Statistics and Information (ONEI), 2016

Data forecast for 2017

### **2.2.3.- 1994 to 2009**

In the early 1990s, after the fall of the Soviet Union, Cuba began to develop tourism intensively with the objective of obtaining foreign currency to regenerate the economy and revive industries and services closely linked to tourism. Tourism was then seen as a temporary solution and expected to only be exploited for the duration of the Special Period. The aim was to increase the role of international tourism as a way to boost the economy in a critical period of the Cuban Revolution (Babb, 2011; Miller, Henthorne, & George, 2008; Sánchez & Adams, 2008). This can be seen in a statement dated July 26, 1990, President Fidel Castro expressed the situation in the following terms: "We are working for tourism with the aim of increasing our inflows in convertible currency with the purpose of satisfying many of the country's needs and especially at times like the present" (Brundenius, 2003, p. 268). The commitment to tourism and "the need to allow maximum tourism development in the shortest time possible" was again supported in a statement in 1991 when the construction of thousands of new rooms was approved with the objective of obtaining significant income from foreign currency and the need to make sacrifices to "save the Homeland, the Revolution and Socialism" (Castro, 1991, p. 9).

The development of international tourism in an economically underdeveloped country facing a lack of services, scarcity of resources, power cuts, etc., was forced to create areas of abundance and consumerism directed towards the enjoyment of tourists. In this regard, tourism often fostered contact between Cubans and tourists from wealthy countries where lifestyles and standards of living were vastly different. Many Cubans saw this stark duality, in so far that many Cubans began to access outside currency by participating in the black market (e.g., selling Cuban cigars, rum illegally). Likewise, the exposure to tourists may have led to the increase interest of leaving the country due to the scarcity of resources that defined the Special Period. Moreover, setting aside some of the already scarce resources for tourism only elevated friction between tourists and residents. President Fidel Castro had prioritized investment in the tourist sector during the Special Period.

"... what the Revolution does on the subject of tourism is simply resolve essential problems of the people and find the resources they so desperately need [...]. If the tourism situation becomes difficult through lack of fuel, we simply say: Fuel for tourism to be kept aside" (Castro, 1991, p. 10).

From the administration's perspective, it was important that resources available on the island were directed towards the development of the tourist sector:

"... the income from tourism is decisive. This is why tourism is so important, and why the fact is so much work needs to be understood. When a new hotel is developed or a new resource for tourism there are those who react as if something was being take away from them; nothing is being taken away, something is being given to the country. And what are we going to do? We do not have the petroleum wells of Kuwait or other countries, but we have sun, we have fresh air, excellent natural resources for creating and resting, we have to create these tourist resources and we have to export them... increasing revenue from tourism. This revenue equals food, medicine, raw materials, essential items" (Castro, 1992, p. 5).

In 1994 the Ministry of Tourism (MINTUR) was officially created, replacing INTUR, to carry out policy, planning, regulation, and control of the tourism sector and its business activities. This included managing the tourism development process through the establishment of state-owned tourism companies. MINTUR sought to make Cuba globally competitive destination, ensuring that tourism was profitable and sustainable over time and had the potential to raise the living standards and quality of life for all Cuban citizens. Among its strategic objectives, MINTUR was to integrate tourism into the whole of the community; increase the number of visitors and place capacity; develop a sustainable tourism product and an overarching culture of quality; ensure human resource training and development; increase revenues; and increase the profitability and efficiency of the sector.

Outside of tourism on a broader political landscape, Act 77 on Foreign Investment, was passed by the National Parliament in September 1995. This act increased the possibilities for different forms of foreign investment in different branches of the economy, including tourism. At the end of the same year, ten agreements were signed for the promotion and reciprocal protection of investments between Cuba and other countries (National Assembly of People's Power, 1995). All these measures were aimed at facilitating and legally guaranteeing foreign investments with the aim of accelerating and boosting the development of the tourism sector.

In the 1990s, the average annual growth rate of tourism in Cuba was 19% in terms of visitors and 26% with regard to revenue, one of the highest in the entire Caribbean region. Tourism became the leading sector in the Cuban economy in terms of contribution from foreign currency. If we compare Cuba's participation in the Caribbean tourism market, it increased from 3% in 1990 to 9% in 2000. By the end of 2002, Cuba would become the primary Caribbean destination for Canadians, Italians, and Spaniards, and the second most popular destination for Germans (Mangano & Mundet, 2002; González, 2005).

The development model and the type of tourism infrastructure constructed that was adopted during this period did not differ significantly from that reflective of the rest of the Caribbean and Central America, thus diminishing competitive advantages. The predominance of international tour operators with all-inclusive "tourism packages" (Martin, 2006, p.54; also see Avella & Mills, 1996) meant a lower diffusion of tourism benefits to the local population and a greater dependence on destinations with large scale tour operators (Quintana et al., 2005, p.105). In addition, the segment of tourists who consumed these packages had medium to low purchasing power, coinciding with a lack of product diversification due to the predominance of the "sun, sea and sand" ("3S") product and the low quality-to-price ratio (Martin de Holan & Phillips, 1997; Navarro, 2010).

According to García (2005), during the 1990s tourism was the only sector of the Cuban economy to simultaneously meet the three conditions that characterized it as a leader: a) the existence of a potential demand, still insufficiently exploited; b) relatively large scale of activity and the existence of cross-sectoral links that allowed the sector's growth to spread to the rest of the economy; and c) a growth rate higher than the general average of the national economy during that decade. Discrete advances were made in its administration and greater professionalism across the whole sector. Links to independent tour operators or those associated with hotel chains that began operations in Cuba were extended and several entities created their own marketing and reception systems (Ayala, 2001; Anoceto, 1998; Brundenius, 2003; Ferradaz, 2001).

It is clear that tourism development that took place during this period also led to it being viewed less and less as something temporary and detrimental to the model of socialist development in Cuba, and more as the beginning of a process in which it was increasingly accepted as an important and decisive factor in the country's economic development. Because of this paradigm shift, it resulted in tourism becoming gradually more integrated into Cuban society and culture. This integration also brought with it negative consequences. For example, President Fidel Castro (2003) recognizing "the resurgence of prostitution alongside the growth of tourism in the 1990s and beginning of 2000 is a reality" (p. 2). This phenomenon was euphemistically called "Jineterismo". The Cuban government fought against this strongly, severely condemning prostitution and sex tourism through Cuban laws that were enacted to reduce all forms of organized prostitution and sexual abuse.

#### **2.2.4.- From 2009 to the current day**

The current era of tourism in Cuba is marked by three key events that changed how tourism developed in Cuba. The first event was on March 31, 2008, when the restriction of domestic travel that had been in place for over a decade prohibiting the domestic travel market (that is, Cuban tourists) was lifted allowing Cubans to use tourist facilities which traded in foreign currency. Since then, the number of overnight Cuban tourists have increased to more than 816,000 in 2014. The domestic market has seen accelerated growth, in terms of both volume and revenue from accommodation, car rental services and the purchase of excursions to

different places around the country; this market is currently the second largest in terms of hotel occupancy, surpassed only by Canadians (Perelló, 2015b).

The second event was the 2009 authorization of *casas particulares*, or accommodations offer in private houses, as part of a strategy to develop self-employment, which opened up other possibilities for both domestic and foreign tourism stays (Harnecker, 2011). In 2011, there were 5,207 rooms providing tourist accommodation services and 1,608 in-home restaurants (known as *paladares*), mostly competitive high-quality products (Marrero, 2012). At the end of 2015, 19,000 private rooms were available for tourists, located in the country's main cities, and distributed across 16,000 different *casa particulares*. By way of comparison, in 2014 the total number of rooms in *casa particulares* were equal to the current room total for the Varadero spa resort (Terrero, 2015, p. 3).

The third event were the pronouncements of December 17, 2014, by Presidents Barack Obama and Raul Castro, regarding the re-establishment of diplomatic relations between the two countries, interrupted over 50 years ago. This opened up new possibilities for trips to Cuba by U.S. citizens, expanding categories for the granting of permits to travel to the country. Though these diplomatic gains have already experienced curtailing under the administration of President Trump, the discussions of possibilities emerged quickly and some tourism businesses such as hotels, cruise lines, and tour operators, capitalizing on the new market. This modification to US government policy, which came into effect in January 2015 and included an extension of the licenses to travel to the island. Cuba was also removed from the list of countries that promote terrorism and the reopening of both countries' embassies. The change in climate between the two nations encouraged increased visits to Cuba by tourists from all emitting countries: "This growth is not due to the arrival of Americans in itself, but due to the push effect originated around the world by the resumption of relations with the United States. Today it is no longer a sin for anyone to come to Cuba" (Perelló, in Castro and Guilarte, 2016, p. 34). It is still to come whether the positive perception will linger longer than the new policies instated that influenced this growth. These three events that have occurred since 2008 have led to changes in the main indicators of tourism activity that can be seen in Table 1, and Figures 1 and 2.

**Table 1. Rooms, physical tourists and revenue in Cuba (2009-2016)**

<b>Year</b>	<b>Rooms</b>	<b>Physical tourists (thousands)</b>	<b>Revenue (millions of USD)</b>
2009	51 734	2 430	2 082.4
2010	55 872	2 532	2 218.4
2011	56 641	2 716	2 503.1
2012	53 248	2 839	2 613.3
2013	53 623	2 853	2 607.8
2014	53 451	3 003	2 546.1
2015	63 600	3 524	2 800.0
2016	65 000	4 100	3 000.0

Source: Authors' own work using data from the Cuban National Bureau of Statistics and Information (2016). Statistical series 1985-2013. Recovered from <http://www.one.cu/series2013.htm>. Cuban National Bureau of Statistics and Information (2015). Cuban Statistical Yearbook 2014, Tourism. Recovered from <http://www.one.cu/aec2014/15%20Turismo.pdf> and MINTUR, 2017

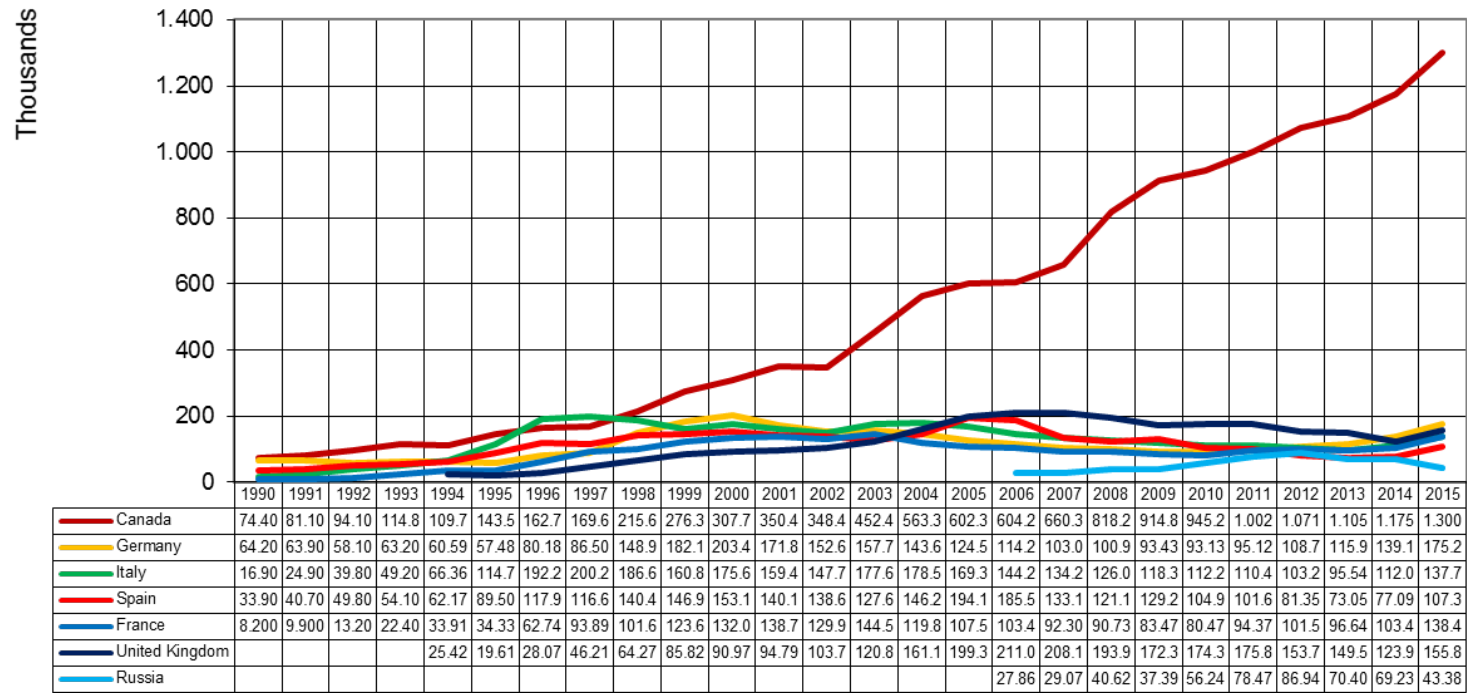
According to the Ministry of Tourism at the International Tourism Fair (FIT, 2016), Cuba has only one type of tourism where both state-owned operations and the private sector converge in their interests and objectives (Delgado & Felipe, 2016, p.8). To this we can add that each has different management and operating formulas, characteristics in terms of facilities, and percentage of occupancy, which is higher and more efficient in the private sector. While growth in the state sector is mainly brought about by large capacity hotels of 200 rooms or more, mostly in beach areas and under the “all inclusive” commercial model, private Cuban entrepreneurs have increasingly diversified their supply of rooms and grown in heritage cities, provincial capitals, and other urban areas as smaller capacity accommodations in the beach areas (Marrero, 2016).

Additionally, another important development for tourism since 2009 is the new Foreign Investment Act approved by the Cuban Parliament in March 2014 that favors the introduction of foreign capital in Cuba in branches of economic development deemed to be priority to the country. This new Act makes foreign investment more flexible, provides legal protection and establishes a clear and definitive framework for its implementation. Tourism was one of the sectors prioritized for these investments and there is anticipation of significant effects (Hingtgen et al., 2015). In November 2017, Cuba has 27 mixed hotel companies (majority-controlled by the government) that operate 4,505 rooms of four and five stars' hotels, while there are 20 international chains that, through 88 contracts, manage and market 43,252 rooms, 63.6 % of the total hotel capacity in the island (Tribuna de La Habana, 2017).

With improvements made to the structure and functions of the Tourism Ministry in 2015, it was established that the Ministry is responsible for taking a leading role in tourist accommodation activities, travel agencies, marinas and nautical activity development, the various tourist products offered by Cuba, tourist transportation, and tourism marketing and promotion. The Ministry of Tourism has therefore been structured in large business groups or business management organizations, working like independent companies: in accommodation four departments each one specialized in different tourist segments (Cubanacán Hotels, Gran Caribe, Islazul, and Campismo Popular), one for supplementary hotel services (Cubasol), one for travel agencies, and one for tourism services (Tourist Services -SERVITUR; MINTUR, 2015). In addition, it also operates and manages almost 40% of the hotel facilities existing in the country via the Grupo Gaviota S.A. (formed in 1988).

The main emitting countries for tourism to Cuba in recent decades have been Canada, the United Kingdom, Germany, France, Italy, Russia and Cubans living abroad, though this is not an exhaustive list (see Figure 3).

Figure 3. Tourist arrivals in Cuba by country, 1990-2015



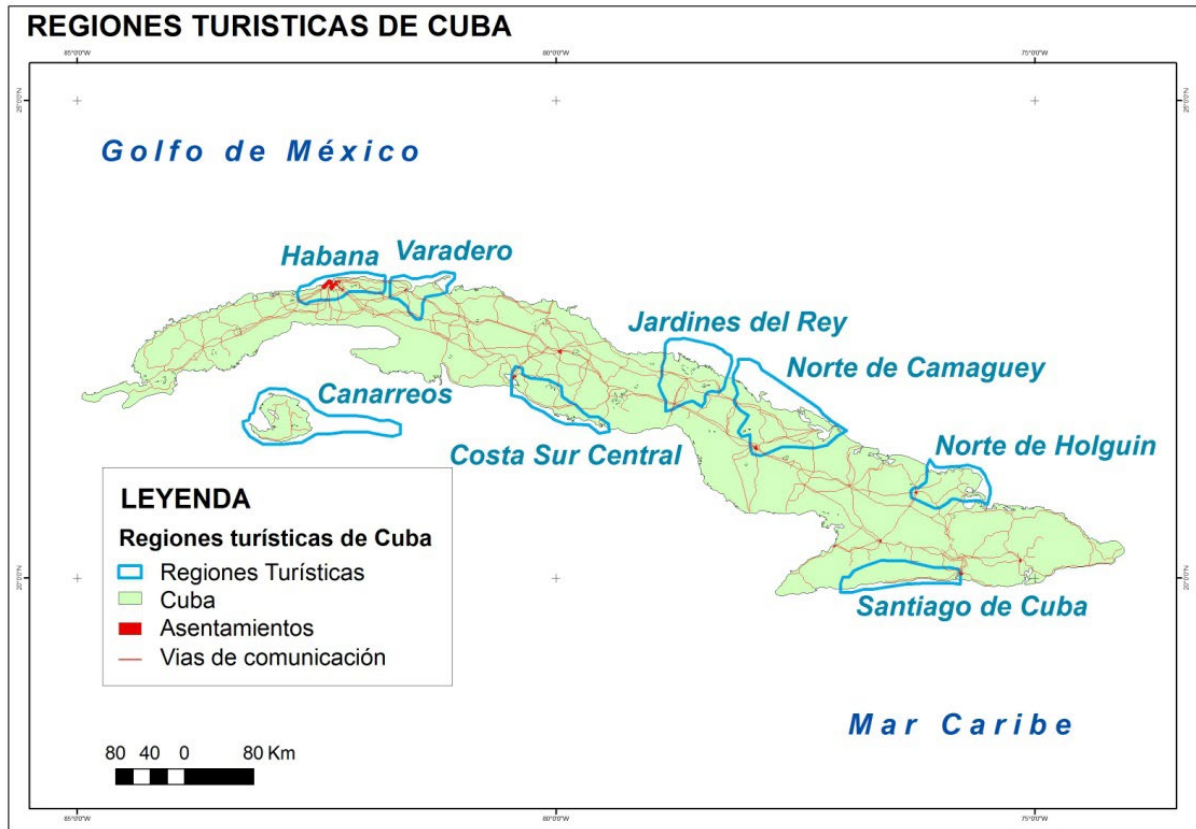
Source: National Bureau of Statistics and Information (ONEI), 2015

### **3.- WHAT'S NEXT: CUBA'S TOURISM POTENTIAL**

At the Seventh Congress of the Communist Party of Cuba held in 2016, the national plan for economic and social development, the *Proposal for a Vision of the Nation, Axes and Strategic Sectors*, was approved through 2030. The plan considers tourism to be a fundamental sector for the country's development in the coming years, along with construction, energy, telecommunications, biotechnology and others, and points out that as a strategic sector, tourism must diversify by developing other tourism products such as marine and nautical tourism, as well as tourism activities related to golf and real estate, nature, agriculture, cruises, history, culture and heritage, conventions, congresses and fairs, and particularly health related tourism. Tourism's contribution to strengthening the internal integration of the Cuban economy was also emphasized in this plan (Cuban Communist Party, 2016, p.26).

In parallel from a geographic lens, it was proposed that tourism development be concentrated in eight priority regions: Havana, Varadero, Jardines del Rey, Norte de Camagüey, Norte de Holguín, Santiago de Cuba, Costa Sur Central and Los Canarreos. The northern keys of Villa Clara have also been added to these in recent years. To the above regions which have important tourist attractions and facilities and where the main tourism investment is found, we can add four important areas for the development of ecotourism, adventure tourism and rural tourism (Viñales, Ciénaga de Zapata, Sierra del Rosario and Baracoa), which already have tourist facilities, significant natural and historical-cultural attractions and good accessibility (see Figure 4).

**Figure 4. Prioritized regions for current and prospective tourism development in Cuba, 2016**



Source: Authors' own data

The most important tourist regions for the development of tourism in Cuba are: Varadero and Havana. Between them they have almost two thirds of all the island's hotel rooms. Tourism has also been an important activity in both locations throughout the twentieth century, so its recent growth did not represent serious problems, as the unexpected arrival of a new player in the territory might have done. From the program approved at the Cuban Communist Party Congress in 2016, MINTUR established its "Development Strategy for the year 2030" where the hotel growth capacity for each region and for each year was established. MINTUR has announced intensive investment plans to expand room capacity to 85,000 by the year 2020 and a projection of 108,717 rooms by 2030, of which more than 30,000 are expected to be built with foreign capital (Delgado, 2016, p.1). MINTUR aims to be able to accommodate the more than the 10 million tourists forecasted to visit the island by 2030.

The total potential room capacity that the country can rationally assimilate has been estimated at around 153,000 rooms (although the maximum possible values would be around 207,000, IPF, 1995, p.56). Of these rooms, some 128,000 (68% of the total) are approved and located in the eight priority regions plus the northern keys of Villa Clara in the center of the country. Further, 80% of potential rooms are located in beach areas, 13% in cities and only 7% in the interior of the territory, in rural landscapes or related to protected natural areas (see Table 2) (MINTUR, 2015).



<b>Table 2. Tourism potential by region</b>	
<b>Tourism regions</b>	<b>Potential rooms (thousands)</b>
<b>Prioritized regions</b>	
Havana	37
Varadero	27
Costa Sur Central	12
Jardines del Rey	19
Norte de Camagüey	32
Norte de Holguín	15
Santiago de Cuba	3
Los Canarreos	10
Norte de Villa Clara	9
<b>Subtotal</b>	<b>164</b>
<b>Non-prioritized regions</b>	
Sagua la Grande	3
Viñales	2
Guanahacabibes	2
Península de Zapata	1
Norte de Las Tunas	6
Sur de Granma	2
Baracoa	16
<b>Subtotal</b>	<b>32</b>
Other territories	11
<b>TOTAL CUBA</b>	<b>207</b>

Source: Cuban Ministry of Tourism, 2000, p.4, IPF, 1995.

Based on accommodation capacity, the tourism product Cuba is positioned to continue offering will be the 3S market, though within this more experiential opportunities may grow such as nautical activities, fishing, diving, etc., and city tourism associated with the important heritage, historical, and cultural resources and an increased focus on hosting events, conferences, and meetings (see Table 3).

**Table 3. Rooms by type of tourism (in thousands), Cuba 2001 and 2015**

Type	Rooms 2001	% of total	Rooms 2015	% of total
Beach	24.9	67	45.5	71.5
City	9.5	25	13.8	21.6
Nature	1.0	3	1.2	1.8
Health	0.6	2	0.9	1.4
Nautical activities	0.9	2	0.9	1.4
Other	0.3	1	1.2	1.8
<b>Total</b>	<b>37.2</b>	<b>100</b>	<b>63.6</b>	<b>100</b>

Source: Cuban Ministry of Tourism, 2015 and Perelló, 2016a, p.2.

In the medium term, it is necessary to re-evaluate room distribution among the different areas of the country, taking into account the sustained rates of growth in modes such as ecotourism, adventure tourism, rural tourism and spa centers, among other types of tourism (world markets to which the Caribbean is not immune). To this end, further analysis of the potential growth of the U.S. market is necessary. A first stage involving programs that appropriately combine beach tourism and visits to protected areas of great natural, historical-cultural and aesthetic-landscape value could provide very good results for Cuba on the international tourist market, which is currently inclined towards new products more related to nature and native cultures.

### 3.1 - Strategies and Challenges for Tourism in Cuba

Various authors and institutions have established potential scenarios for developing tourism in Cuba based on an integrated evaluation of activity in the domestic and foreign tourism sectors (Ayala, 2001; García, 1998; INTUR, 1980; IPF, 1978; MINTUR, 2000, 2015; U.N. World Tourism Organization [UNWTO], 2002; Quintana et. al., 2005; Salinas Er., 1998, 2013; Risco & Mundet, 2005; Feinberg & Newfarmer, 2016). Specifically, between 1990 and 2005 MINTUR developed three scenarios that projected growth up to 2010: the first two were in accordance with the circumstance of the continued U.S. embargo of Cuba and the last one was for if the blockade was lifted. These scenarios did not come to pass for a number of reasons including the economic crisis during the Special Period and the fall of socialism and dissolution of trading partners within the U.S.S.R., the slowing of tourism growth around the world and in the Caribbean after September 11, 2001, the 2008-2009 economic crisis in the U.S. and Europe, and the resurgence of the U.S. embargo on Cuba as a result of the Helm-Burton Act in 1996. In 2000, UNWTO made a forecast of arrivals to Cuba, along with projections for the Caribbean, the Americas and the world, shown in Table 4.

**Table 4. Growth forecasts in visitor arrivals (in millions) to Cuba, based on the year 2000**

Year	World, with an average growth of 4.1%	The Americas, with an average growth of 3.9 %	The Caribbean, with an average growth of 4.3 %	Cuba, with an average growth of 6.8%
2000	698	130	17	1.8

2005	862	157	21	2.8
2010	1,054	190	27	4.3
2020	1,561	282	40	6.7

Source: Hosteltur, 2 July 2001, Spain, in Ayala, 2001, p. 54.

Comparing these UNWTO figures with the actual number of tourists received in Cuba in 2005, 2010 and 2015, which were 2.3, 2.5 and 3.5 million respectively, we note that despite the slowed growth between 2005 and 2010, their forecast was relatively close to what has been happening with tourism in Cuba. However important to note is that the actual numbers in 2015 includes a surge of U.S. tourists after diplomatic relations with the U.S. were restored at that time. Still, tourism to Cuba increased by half a million visitors compared to the previous year and the figure reached 4.1 million by 2016. This represents, even without the lifting of restrictions on travel to Cuba for U.S. citizens, an annual growth of almost half a million visitors, and would take the figure to around six million in 2020, close to the scenario proposed by the UNWTO in 2000. Other more conservative sources predict the arrival of 5.2 million visitors to Cuba in 2020 (Perelló, 2016a, p.15).

According to tourist surveys carried out by MINTUR (2015), the level of satisfaction is above 90%, and 4 out of 10 tourists to Cuba are repeat visitors. This provides some explanation of the positive trend in the figures as well. Value for money, particularly in all-inclusive package holidays related to beach hotels, is satisfactory. However, if we go outside the package holiday, prices for non-hotel services such as taxis, restaurants, and recreation services, are high in relation to their quality, especially in the state sector; that is to say, prices expected by the average tourist visiting the Caribbean.

With regard to the potential continued growth in tourist arrivals to Cuba, strategies towards development in Cuba require adjustments if it is to adapt to constant changes in the globalized market. The main challenges Cuba faces, especially within the state-owned businesses and enterprises, can be summarized as follows:

- Stabilizing the supply of national products required by tourism, both in terms of quantity and quality, in order to replace imports.
- Reducing costs, improving accounting, auditing and business profitability.
- Offering competitive prices for domestic tourism in order not to lay off employees in the off-season for international tourism (to avoid losses due to decreased hotel occupancy).
- Awarding greater decision-making autonomy to the different tourist institutions and freeing them from too much state control and auditing.
- Improving the quality of services provided to tourists.
- Achieving greater efficiency in the investment process in relation to the construction of new hotels and remodeling of existing ones.
- Increasing the potential for the multiplier effect of tourism on the Cuban economy.
- Diversifying the tourist products offered.
- Improving tourism marketing and promotion.
- Increasing the participation of foreign capital in investments, marketing, and administration.
- Expanding distribution channels between tour operators and travel agencies (Delgado 2016; Elliott & Neirotti, 2008).

To this list, Feinberg & Newfarmer (2016) add the following policies promoting sustainable growth for the tourism sector in Cuba:

- Simplifying the tax structure facing private firms and property owners (e.g., operators of paladares and casas particulares).
- Progressively replacing this complex rationing system of foreign exchange with a modern trading system and a modern tax system.
- Revamping the pricing systems governing critical inputs, together with exchange rate reforms.
- Increasing connectivity (e.g., Internet) as a critical channel for distribution of marketing and making reservations, as well as an expected amenity during a tourist's experience. For example, according to rankings by the travel search engine Kayak, Havana is the top destination for those seeking a "digital detox", as 98% of its hotels have no available Wi-Fi (Hosteltur Caribe, 2017).

Similarly, Cuba has several competitive advantages over other Caribbean countries (Thomas, Kitterlin-Lynch & del Valle, 2015; Salinas, Echarri & Salinas, 2008), which should favor diversification of its tourism products. These include:

- Its greater size and geographic location, climatic peculiarities and the greater diversity of its relief, factors that determine its great variety of natural and anthropic landscapes.
- Important water and land resources of interest to tourism.
- Political and social stability.
- A hospitable population with a high level of culture and health.
- High level of technical and professional training of workforce employed in tourism.
- Extensive road and airport infrastructure.
- Electrical, communications and drinking water networks covering the entire country.
- Accommodation and restaurant, recreational and other infrastructure expanding in both the state and private sector.
- Advanced tourism studies in a network of universities and a large number of postgraduate Master's and doctoral courses.

Specifically, the marketing and competitiveness of Cuban tourism in the coming years should be based, among other aspects, on the following: diversifying and differentiating services and products, sustainability of the tourism model and excellence in the services provided to tourists. This will require important sources of financing and a comprehensive systematic commitment towards human capital training (tourism managers, specialists and service workers in general).

### **3.2.- Perspectives on the U.S. tourism market in Cuba**

The U.S. tourism market deserves special attention due to the evolving relationship with Cuba. Though many of the travel restrictions were reinstated in 2017 under the President Trump Administration, the almost two years of lifted travel bans (2015 – 2017) allowed for an increase in "people-to-people" travel (i.e., individualized travel that is not part of an educational or religious-based tour group) and started an important dialogue of what tourism between the two countries could look like under normalized relations. Evidenced in Table 5

was the scope of the U.S. tourism market to Cuba before the 2015 policy change that facilitated increased travel to Cuba.

**Table 5. Growth of different US market segments in Cuba, 2010-2014**

<b>Segments</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
By air via a third country	123,107	143,051	192,750	179,289	176,734
By sea	588	682	848	1,986	2,484
Cuban-Americans via a direct route	263,305	285,322	269,361	261,881	258,961
<b>TOTAL</b>	<b>387,000</b>	<b>429,055</b>	<b>462,959</b>	<b>443,156</b>	<b>438,179</b>

Source: Perelló, 2015a, p.1

As has been suggested by various specialists (e.g., Feinberg & Newfarmer, 2016), had this new political scenario with the U.S. remained, the market would have likely become one of Cuba's main emitting countries due to its geographic proximity and the interest of its citizens. A study conducted by Texas AgriLife Research at Texas A&M University stated that, at a conservative estimate, under an unrestricted travel scenario some 540,000 Americans would have traveled to Cuba in the first year, with an average stay of 4.5 days and food and beverage consumption of US \$60.00/day, which would represent US \$145,800,000 for Cuba, for this concept alone (Perelló, 2016b). Further the study suggested that under these circumstances more than one million Americans would have been expected to visit the country in the next five years. Of these, 60% would have been interested in visiting Cuba as part of a cruise, compared to 13% who would want a stay on the island. Further, according to Perelló (2015a) the main demographics interested in vacationing in Cuba were high-income Americans and young people aged between 16 and 24. A large segment of those who would travel to Cuba would have also been considered Hispanic Americans (Perelló, 2015a).

Similarly, under normalized U.S.- Cuba relations, experts predicted that there would be a number of Americans who would register as residents (temporary or permanent) as they initiated business within Cuba. This would have been a new professional segment in addition to those arriving as a result of professional and academic exchanges with institutions which had previously been allowed. The importance of this would have been linked to the development of new U.S. investments in Cuba, especially in the telecommunications, automotive, and construction industry sectors. Finally, in the medium to long term, there would have likely been a considerable increase in the number of arrivals by sea (yachts and cruises), and the establishment of a ferry services between the ports in Havana and Florida would have continued to grow (Perelló, 2015a, p.4).

The potential growth of all of these U.S. tourism markets would have been influenced by the general ease of travel as a result of close proximity between the two countries (e.g., low cost of flights and Cuban ports added to existing Caribbean cruises). Likewise, other infrastructure development such as the growth of *casas particulares* (private rental houses) around the country, which by 2015 had already exceeded 16,000 in number, was also beginning to make travel planning easier from afar. Additionally, U.S. investors were being

attracted to various sectors of the Cuban economy where they were beginning to position themselves to be “market ready” if and when the U.S. embargo was completely lifted. Finally, it was expected that the growth in the U.S. tourism market would have been triggered by the novelty of and curiosity to learn more about a country that was prohibited to them for several decades (Caribbean Hotel and Tourism Association, 2015).

This regularization of tourist flows from the U.S. would have posed a major challenge for Cuban tourism where people-to-people travel was allowable creating more demand on non-packaged tourism experiences such as cultural visits to Havana (Marquetti, 2015). Others have been more critical and suggested that Cuba was not prepared to receive an increased flow of tourists from the U.S., noting that “liberalization could bring a flood of American baby boomers to the island, eager to discover the much-appreciated Havana, and create a cheap beach option for US consumers, which would increase the demand for tourism in Cuba and raise prices” (Laframboise, 2015, p. 31). Additionally, they suggested that as “Cuba retains a surprisingly similar aspect to the one it had in the 1950s, it is possible that soon more Americans will see the country as Hemingway saw it, that is, as a time capsule, which could be a key attraction for many older Americans” (Laframboise, 2015, p. 32).

In June 2017, President Donald Trump rolled back policies from President Obama’s Administration and imposed new sanctions on Cuba. Among these, organizing visits to Cuba for people-to-people travel is once again prohibited for U.S. visitors, as are financial transactions with Cuban state enterprises managed by the armed forces (Gaviota, the military enterprise in the tourism sector). However, it is important to note that tourism was growing across many global markets:

“Excluding Cuban Americans, the number of U.S. visitors in 2016 was 284,937 - just 7% of Cuba’s 4.1 million foreign visitors that year. Many of those U.S. visitors went on trips that would still be allowed under the new rules as most are already traveling with group tours, which are unaffected by the new regulations. Moreover, in general the biggest determinant of visits to tourism destinations is the availability of air transport, and President Trump’s new measures do not affect either current or future civil air connections to Cuba... the overall impact will be smaller than the Trump trumpeted headlines would suggest. This is not the end of the world for the Cuban economy... But they will have a disproportionately negative impact on Cuba’s emerging private sector and on non-military employment in linkage industries” (Leogrande & Newfarmer, 2017, p.1).

The curtailing of the budding relationship is a reminder of its volatility that it can easily shift with a change under new administrations, but more importantly, Cuba’s tourism is set to grow with or without people-to-people travel from the U.S. tourism market.

#### **4.- CONCLUSIONS**

Tourism has experienced rapid growth in Cuba over the past 25 years, and this should continue into the next decade, although slowing down and adjusting its growth rate more to global trends. The Cuban government and tourism institutions have created policies and strategies for development that will allow the country to establish itself as the primary Caribbean island destination and one of the main tourist destinations of the Americas. The tourism industry in Cuba, during the most severe economic recession of the Special Period,

prevented the county from entering into an even deeper economic crisis. This was particularly thanks to policies enacted to attract foreign tourists and the creation of a large number of jobs within the sector. The Cuban government has also engaged with foreign investors in order to obtain the necessary financing for tourism development, leading to a high dependence on such investment and the continued establishment of a 3S tourism based on all-inclusive package deals as the main tourism product. It is a model that foreign entrepreneurs consider safest for obtaining short-term profits, although in practice leads to a high consumption of resources. However, this accelerated development, coupled with a tourism model which aimed for growth by increasing the number of arrivals and hotel rooms, has given rise to a series of problems. As in many Caribbean destinations, the value of mass tourism or 3S tourism, towards its contribution to the country's development and improving the quality of life of its population, should continue to be critiqued. The opportunity cost, however, is the possible lost opportunities to develop other more sustainable forms of tourism such as nature-based tourism, health tourism, and agrotourism, among others.

Further, two trends are currently observed in Cuban tourism; on the one hand there is the concentration of tourism as private business (e.g., *casas particulares* and *paladares*) and on the other, the centralized development policy and control of the industry by the national government. These two trends must demonstrate through evidence and research that both have utility in the broader Cuban tourism landscape in the medium and long term, and have the potential to contribute to a model of sustainability and prosperity within a socialist Cuba.

Greater reflection of the serious dangers involved in this model of tourism development given the fragility of both social and ecological systems, should be undertaken. Islands are particularly sensitive systems due to their natural isolation, strong marine influence, small size, low geographic complexity and relative biodiversity, high endemism and strong vulnerability to natural and environmental disasters, which make them very sensitive to anthropic modification.

Finally, remaining competitive in tourism is a significant challenge that goes beyond the U.S. tourism market and evolving sanctions. The last two decades have seen an erosion of Cuba's competitiveness relative to other Caribbean destinations, meaning that Cuba will have to strategically plan for and develop tourism in a way that raises the quality of the tourism product that differentiates it from the rest of the Caribbean (LeoGrande & Newfarmer, 2017).

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