CUBA AND CARIBBEAN TOURISM AFTER CASTRO

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Abstract: Cuba has become a major force in Caribbean tourism. If or when US travel restrictions are lifted, it might quickly become the dominant player, siphoning off American tourists from competitors. This paper presents an overview of tourism in Cuba and the Caribbean before and during Castro, and discusses factors that might condition a post-Castro transition. Further it reviews tourism products Cuba might introduce into the Caribbean market. Based on historical trends and interviews, the study projects tourism growth in Cuba after a five-year transition period and simulates the quantitative diversion of US tourists from competing destinations. Concern among regional neighbors about negative impacts to their tourism activities appears justified. Keywords: Caribbean, Cuba, Castro, diversion. © 2007 Elsevier Ltd. All rights reserved.

RÉSUMÉ: Cuba et le tourisme antillais après Castro. Cuba est devenu une force majeure dans le tourisme antillais. Si les USA lèvent les restrictions de voyage, Cuba pourrait devenir très vite le protagoniste en détournant les touristes américains de la compétition. Cet article présente une vue d’ensemble du tourisme à Cuba et aux Antilles avant et pendant le régime de Castro et discute des facteurs qui pourraient influencer une transition post-Castro. En plus, il envisage les produits de tourisme que Cuba pourrait offrir sur le marché antillais. En se basant sur des tendances historiques et des enquêtes, l’étude projette la croissance du tourisme à Cuba après cinq ans de transition et présente une simulation du détournement des touristes des États-Unis des destinations concurrentes. L’inquiétude des destinations voisines au sujet des impacts négatifs semble justifiée. Mots-clés: Antilles, Cuba, Castro, détournement. © 2007 Elsevier Ltd. All rights reserved.

INTRODUCTION

The Caribbean Sea is home to the world’s largest assemblage of small and large islands with a wide fusion of languages, ethnic groups, and customs (Thomas 1988). Highly dependent on tourism for jobs and income, the Caribbean is the most tourism-penetrated area in the world, with the industry accounting for roughly 20% of exports and capital formation and 15% of employment and GDP (WITC 2006). This paper analyzes recent trends in the Caribbean and estimates the likely

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distributional effects of a post-Castro Cuba on regional patterns, particularly for American tourists most directly affected by the US-imposed restrictions on travel to and trade with Cuba.

This analysis is timely for four reasons. First, tourism has come to occupy a central place among Caribbean economies, replacing traditional colonial staples like sugar, tobacco, and coffee as the engine of economic growth (Fields 1984; Mooms 1986; Spoor 2000). Second, at least for the near term, the opening of Cuba to US tourists and investors will likely have major repercussions on competing destinations (Henthorne and Miller 2003). Third, recent tourism growth has been highly uneven among the various Caribbean destinations; the opening of Cuba to US tourists could worsen these trends. Nearly three-fourths of the increase in revenues between 1970 and 1999 was associated with only five of the 30 Caribbean destinations (WTTC 2002). Finally, with Castro now in his 80s and (as of late 2006) reportedly quite ill, a regime transition appears imminent.

During the first two decades of Castro’s rule (60s and 70s), tourism in Cuba was essentially non-existent, viewed as a Western “vice” inconsistent with socialist goals (Espino 1991, 1995; Schwartz 1997; Thomas 1998). Other Caribbean destinations took advantage of this void and of the rising North American and European affluence, economical jet travel, foreign hotel investment encouraged by tax concessions, and large-scale expansion of aid-financed infrastructure (McElroy and de Albuquerque 1996). The Soviet Union’s sudden collapse and the loss of US$6.5 billion (in 2005 dollars) in annual Soviet subsidy changed the competitive environment dramatically. It forced Cuba to turn to tourism as a replacement industry (Espino 2001; Gordon 1997), putting increased pressure on other regional destinations. The allure of its natural charms (Linden 2003) and its status as a curiosity or “forbidden” destination made Cuba one of the world’s fastest growing destinations, expanding from 300,000 annual arrivals in 1989 to nearly 2.5 million in 2005.

Although US residents account for over half of all tourists to the Caribbean, fewer than four percent of Cuba’s annual tourists are US residents, mostly Cuban Americans visiting relatives. (A relatively small but indeterminate number of “illegal” US tourists travel to Cuba through secondary countries such as Mexico or the Bahamas). Additional US restrictions recently imposed have further reduced travel of its residents and scholars to Cuba (Bruni 2001; Kirkpatrick 2003; San Martín 2002). Canadians (17%), Germans (11%), Italians (10%), and Spaniards (9%) represent the country’s dominant origin markets (CTO 2004). But with Castro in his 80s and notable—if inconsistent—sentiment in the US Congress to modify the embargo, many destinations as far away from Cuba as Bermuda, and as close as Key West, Florida, are increasingly concerned (Auscenda 2002; Henthorne and Miller 2003). Whether through a transition or a succession event after Castro or through the elimination of imposed sanctions on US citizen travel and investments in Cuba, the possibilities for considerable changes in Caribbean tourism patterns are now more probable than at any time since the 60s.
The approach below consists of three elements: a brief review of
tourism in Cuba and the Caribbean before and during Castro; an
analysis of likely transition or succession events after Castro; and,
after a review of the variety of tourism products Cuba might offer, an estimation
of the post-Castro impact both on Cuba's tourism growth and the diversion
of US tourists away from neighboring destinations. The impact estimates are based on evidence from historical trends, suggestions from recent research, and evidence from extensive, open-ended interviews with regional heads of state, as well as with area travel experts and key executives and managers of principal hotel chains doing business in Cuba and in the Caribbean. Hoteliers were asked what it was like to operate there, and all were questioned about the likely tourism scenario after Castro, focusing on the impact on US tourism flows. Since the analysis deals with myriad uncertainties concerning the character of the transition, the US policy response, and the diversion of tourists to Cuba from surrounding destinations, the impact estimates here should be regarded as simulations and "what if" scenarios.

Table 1. Non-resident Tourist Arrivals for Selected Countries

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<td></td>
<td>NA</td>
<td>1.18 m.</td>
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<td>25.5 m</td>
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<tr>
<td>France</td>
<td>2.3 m.</td>
<td>3.31 m.</td>
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<td>76.5 m</td>
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<td>Greece</td>
<td>NA</td>
<td>157,000</td>
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<td>13.6 m</td>
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<td>Italy</td>
<td>7.7 m.</td>
<td>12.67 m.</td>
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<td>58.0 m</td>
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<tr>
<td>Spain</td>
<td>1.0 m.</td>
<td>3.0 m.</td>
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<td>49.5 m</td>
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<td>USA</td>
<td>978,693</td>
<td></td>
<td></td>
<td>45.5 m</td>
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<tr>
<td>Caribbean</td>
<td></td>
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<tr>
<td>Barbados</td>
<td>NA</td>
<td>17,820</td>
<td>2.1 m.</td>
<td>507,686</td>
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<tr>
<td>Bermuda</td>
<td>88,000</td>
<td>120,994</td>
<td>26.3 m., 80% US citizens</td>
<td>274,893</td>
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<tr>
<td>Cuba</td>
<td>180,014</td>
<td>381,600</td>
<td>57.2 m., 90% US citizens</td>
<td>1,774,541</td>
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<td>Dominican Republic</td>
<td>14,796</td>
<td>49,040</td>
<td>7.3 m.</td>
<td>2,868,915</td>
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<tr>
<td>Haiti</td>
<td>13,679</td>
<td>68,000</td>
<td>8.5 m.</td>
<td>110,000</td>
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<tr>
<td>Jamaica</td>
<td>74,892</td>
<td>161,386</td>
<td>29 m.</td>
<td>1,276,516</td>
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<td>Mexico</td>
<td>NA</td>
<td>611,500</td>
<td>19.8 m.</td>
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<tr>
<td>Nassau (Bahamas)</td>
<td>45,371</td>
<td>192,480</td>
<td>28 m., 94% US citizens</td>
<td>1,428,209</td>
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<tr>
<td>Puerto Rico</td>
<td>64,507</td>
<td>237,583</td>
<td>29.5 m.</td>
<td>1,219,531</td>
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<tr>
<td>Trinidad and Tobago</td>
<td>64,280</td>
<td>185,000</td>
<td>32.3 m.</td>
<td>395,103</td>
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<tr>
<td>Virgin Islands</td>
<td>20,295</td>
<td>99,563</td>
<td>13.6 m.</td>
<td>609,648</td>
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Sources: Maribona, Turismo en Cuba (1959) and Caribbean Tourism Organization and World Tourism Organization (various editions).

Notes: In several cases, the data include both stayovers and excursionists. Mexico's numbers are for the entire country and not just for its more recent Caribbean destinations. The data for the "Virgin Islands" exclude the British Virgin Islands for consistency purposes. And the numbers for Italy clearly seem high in comparison to those of other European nations.
CUBA AND CARIBBEAN TOURISM

Nonetheless, they provide a reasonable basis for gauging the contours of a post-Castro Caribbean tourism for the development of strategies and plans by destinations likely to be significantly affected. While there have been several studies that qualitatively discuss post-Castro scenarios and the Cuban economy (Askari, Forrer, Teegen and Yang 2003; Cerviño and Cubillo 2005; Espino 1991; Hall 1995; Henthorne and Miller 2003; Jayawardena 2003; Martín de Holan and Phillips 1997; Pitoff 2002; Radu 2002; Simon 1996; Weintraub 2000), this is the first to present quantitative estimates of the regional distributional tourism effects under specified assumptions.

CUBAN TOURISM

Previous tourism experiences of Cuba can furnish insights that might be helpful in anticipating changes coming to it after Castro. Although historical information about Caribbean tourism is difficult to obtain, the work of Armando Maribona (1943, 1959) provides useful and contemporaneous commentary about early Cuban and Caribbean tourism. The largest island in the region (over three-fourths the size of England), the country was an early tourism leader with three significant tourism periods: an expansion in the 20s; a second in the 50s; and the current one that began in earnest in 1989. This last cycle has already lasted longer than the other two, reflecting the current importance of this industry to its economy. The fourth cycle will begin after Castro and will have important consequences for the country and the region.

After World War II Cuba lost US market share to neighboring destinations because of limited hotel capacity. In 1955, however, legislation allowing casinos in any hotel with a maximum $1 million investment led to the construction of four new hotel/casinos and to the refurbishing of four existing ones, literally within months (Crespo 1999; Schwartz 1997). The new properties, along with highly effective marketing in major US markets, were sufficient to bring Cuba to the front of Caribbean tourism in short order. By 1957 this destination was second only to Mexico in arrivals in all of the Caribbean and Latin America; the estimated tourism spending was roughly double that of its principal rivals (Maribona 1959). This was remarkable performance considering the brevity of the three-year period of growth and increasing political violence in Havana (Schwartz 1997). The explosion in Cuban tourism during this truncated period—reflective of its inherent attractiveness, location, and linkages to the United States—are suggestive of potential developments after Castro.

The Revolution and Caribbean Tourism

Cuba’s withdrawal from tourism during the first three decades of the Castro era constituted a windfall for competing Caribbean destinations. Investments and arrivals grew rapidly in Puerto Rico, the “Mayan
Riviera" of Cancún and Cozumel, Mexico, the US Virgin Islands, and Jamaica. In 1970, around 4 million tourists traveled to the Caribbean. By 1975, this volume had grown to 5.5 and then to just under 7 million by 1980. Puerto Rico (1.6 million), the Bahamas (1.2 million), US Virgin Islands (692,000) and Bermuda (492,000) were the leading destinations at the beginning of the 80s. An already fragile Cuban economy collapsed within months after the disintegration of the former Soviet Union in the late 80s, forcing a return to tourism and foreign investment (Aberhard 2002; Gonzalez 2002; Pérez-López 2001, 2002).

Dramatic changes in tourism patterns over the last two decades have favored the two larger, Spanish-speaking islands, Cuba and the Dominican Republic. Associated with these trends is the forceful presence of all-inclusive hotel chains and tour operators. As shown in Table 2, while their shares of the total Caribbean market have tripled from three to 10%, and six to 17%, respectively, Bahamian and Mexican shares have declined and Jamaica and Puerto Rico have retained or modestly improved their positions. Even without many US tourists coming to the island, and without direct American investments, Cuba has been able to make major market inroads. Due to the large number of Caribbean destinations and to simplify the exposition and highlight trends, the rest of the Caribbean destinations are grouped in Table 2 into three categories defined by a five-year (1995–2000) average level of per-tourist spending: upscale (over $1,300), middle ($900–$1,250), and low ($350–$850). Since 1985, there has been a drop in the rest of the Caribbean upscale share while the other two groups (middle and low) maintained their positions. The former are relatively small destinations and while a few improved (such as US Virgin Islands, Turks and Caicos), their overall percentage market share declined as the rest of the Caribbean grew more rapidly in absolute terms.

The uneven growth since 1985 is highlighted by regression results of the natural logarithm of arrivals (dependent variable) as a function of

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<tr>
<td>Bahamas</td>
<td>17</td>
<td>12</td>
<td>10</td>
<td>9</td>
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<tr>
<td>Cuba</td>
<td>3</td>
<td>4</td>
<td>8</td>
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<td>Dominican Rep.</td>
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<td>12</td>
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<tr>
<td>Mexico</td>
<td>18</td>
<td>17</td>
<td>17</td>
<td>15</td>
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<td>Jamaica</td>
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<td>Puerto Rico</td>
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<td>ROC-Upscalea</td>
<td>17</td>
<td>12</td>
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<td>ROC-Middleb</td>
<td>18</td>
<td>20</td>
<td>17</td>
<td>16</td>
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<td>ROC-Lowc</td>
<td>8</td>
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a Rest of Caribbean (ROC) where on average tourists spent more than $1,300 per person for the 1995–2000 period; b Rest of Caribbean where on average tourists spent between $500 and $1,250; c Rest of Caribbean where on average tourists spent between $350 and $850.
time (year the independent variable) shown in Table 3. For the region as a whole, arrivals increased 4.8% per year over the 1985–2004 period but 7.0% per year for the 1985–1994 and only 2.4% for the 1994–2004 periods. This growth deceleration reflects the influence of the September 11 terrorist attacks (Crespo and Suddaby 2002), but also stems from changes in global tourism including the resurgence in East Asia, Pacific, Eastern European, and African markets. The three fastest growing Caribbean destinations have been Cuba, Dominican Republic, and Puerto Rico. All destinations except for Cuba have experienced significantly lower annual growth rates during the second part of this decade. These results highlight the concentrated nature of recent growth and Cuba’s rapid resurgence.

However, Cuban growth has been no panacea. According to interviews conducted for this study with top managers of hotel chains doing business, the bureaucratic controls of the regime transform managers into “operators” who must contend with excessive bureaucracy, inconsistent legislation, and a capricious and expensive labor market whereby hotel managers can fire workers but cannot choose their replacements. They must pay the Cuban government employment agency in dollars for each worker monthly (typically between $300 and $500) while the workers receive in Cuban pesos the equivalent of about $20 per month. The government retains the difference. Yet resort jobs are coveted (and preferentially distributed) because workers receive significant tips. Foreign managers, while acknowledging socialist challenges, indicate privately they are in Cuba because their main competitors are there and because their presence gives them an “early mover” advantage over later entrants, specifically the US hotel chains. The economic impact of tourism has been blunted by the destination’s high import leakage rates (which are significantly above the 40–50% Caribbean norm) and very low tourist return ratios (Martín de Holan and Phillips 1997; Simón 1995). As a result, net annual tourism revenues—not accounting for infrastructure and resort expenses—generously estimated for 2003 at $800–900 million, plus the estimated $550 million in remittances (Suro, Bendixen, Lowell, and Benavides 2003), amount to less than a third of the peak Soviet assistance (Pérez-López 2001, 2002).

Tourism has also created ideological and social problems for the regime. The government’s so-called “apartheid” tourism policy prohibits Cubans from frequenting the resorts, and the industry has spawned prostitution, some of it highly organized, leading to efforts by the regime to control it (Bruni 1999; Clancy 2002; Davidson 1996; Zúñiga 1998). After police crackdowns, activity reportedly subsided (Eaton 2003), although a more recent report suggests it remains widespread (McKinley 2004).

The Unique Character of the Transition

There is no certain consensus on the shape of the transition after Castro (Aguirre 2002; Cuba Transition Project 2004; González 2002;
Radif 2004). Recent history of political shifts from totalitarianism to democracy in Eastern Europe and Asia demonstrates there is no single model of “translology” (Aslund and Hewko 2002; Raduf 2002; Radhif 2004; Stein and Kane-Hanan 1996), but rather a spectrum of outcomes (Anderson, Fish, Hanson and Roeder 2002; Dahl 2000; Linz and Stepan 1996; O’Donnell and Schmitter 1986; Roland 2002; Vachudova 2005). They range from liberal democracies with functioning market economies (Poland, Hungary, Czech Republic) to authoritarian regimes with limited reforms (Turkmenistan, Belarus, Uzbekistan) and include cases in between (Russia, Moldova, Romania). Even though the departure of Castro, a 20th century international icon, might create a major vacuum and spawn a period of instability, arguably it will not be as severe as experiences in Iraq, Serbia, or Bosnia (Cuba Transition Project 2004). In spite of these varied outcomes, few commentators predict a chaotic result after Castro because of the general resilience of the regime over the past half century, central position and enduring strength of the military over the levers of control; immense need for foreign currency and investments to improve a deteriorated economy; and international community and Cuban-American exile stakes in a successful transition.

Several other considerations also suggest that the post-Castro path will be unique. These include Cuba’s location and historical ties with the United States, its Latin American culture and traditions, and, perhaps most importantly, the nature of its tourism industry. Although the length and intensity of the transition will depend on how power is transferred, the performance of the leadership that emerges, and the manner of foreign intervention, it is likely that the emerging governing structure would attempt to restore a modicum of equilibrium and effectively protect tourism, a trade extremely susceptible to political upheaval (Mansfield and Pizam 2006). In addition, one cannot rule out favorable Canadian and European diplomatic efforts to protect their major investments in Cuba.

The Chinese transition, focusing on exports and market reforms with a strong military role (the Chinese People’s Liberation Army), might provide insights about a post-Castro Cuba, at least in the early stages (Pearson 1997; Radhif 2004; Shambagh 2000). A Chinese model, however, might require levels of repression and control that would prove difficult to maintain after Castro departs. Nonetheless, Cuba’s military, the Revolutionary Armed Forces—under the direction of Raúl Castro, Castro’s chosen successor—exerts a strong grip on the economy. During a transition, the military’s involvement might grow to maintain civil order until such time as a new government achieves legitimacy (Cuba Transition Project 2004; Fuentes 2004; Latell 2005; Suchlak 2004). To retain power, the new leadership, lacking Castro’s status and public tolerance, will have to respond to rising pressures both for increased security and for economic and social changes. Perhaps the most important lesson for post-Castro Cuba is that Deng Xiaoping, Jiang Zemin, and Hu Jintao have been successful as rulers because China’s reforms have benefited a broad majority of the Chinese people. The death of Raúl Castro before his older brother might
complicate transition events further as there are no other designated successors (Ratliff 2004; Suchliki 2004).

Even if political change toward a more open society comes gradually, economic gains are likely to be more rapid, as the Chinese and Vietnamese experiences have shown (Aslund and Hewko 2002; Cuba Transition Project 2004; Radu 2002; Ratliff 2004). Cuba's citizens, including its rapidly growing older population, as well as the international community writ large, might require that Castro's replacements pay attention to domestic stability and to economic welfare and growth. Tourism will be a central element because of its critical economic importance. The all-inclusive resort segment has shown its viability since the Soviet collapse despite constraints imposed by the regime. A faster transition toward democracy and open markets as well as a reversal in US policy would make Cuba a more attractive destination for tourists and investors. Its tourism would therefore still pose a major threat to other Caribbean destinations even if the post-Castro transition does not immediately reverse the socialist and totalitarian regime.

Based on the foregoing analysis, two broad scenarios are worth reviewing. The first (and less likely one) assumes the form of government in Cuba remains the same as it is now, with continuing "hardlines" on both sides of the Florida Straits. This would imply US travel and investment rules would not change appreciably and relations between the two nations would remain as intractable as they are now. Such an outcome—business as usual—is likely to have the least impact on Cuba's tourism and on the rest of the Caribbean (Simon 1995), for several reasons. First, its current strategy of price (low-cost) leadership requires that both its prices and its costs be lower than those of its competitors. The absence of economic rivalry, the lack of supporting industries, and, more generally, the economic inefficiencies inherent in Cuban socialism suggest that this destination could not compete as effectively over the longer term against others like the Dominican Republic for US tourists (Martín de Holan and Phillips 1997). Even if Cuba did not have to import most of its tourism inputs, it would still be producing services and products with a socialist cost structure but pricing them at competitive world prices. Second, foreign investment would continue to be problematic due to myriad regulations and bureaucratic policies; majority foreign ownership would continue to be prohibited; capitalism and private enterprise would be hindered, and tourists would be kept artificially apart from most Cubans. Finally, relations with the United States, the largest and wealthiest generating market, would remain uncertain, and this would further dampen foreign investment.

A second scenario, after an inevitable period of uncertainty and transition, would suggest a thawing of relations between Cuba and the United States after Castro, with the lifting of certain aspects of the embargo as his replacements make overtures to the US mainland and to Europe and allow greater personal freedoms and safer foreign investments (Gonzalez 2002; Martín de Holan and Phillips 1997; Stein and Kane-Kenan 1996; Weintraub 2000). This conclusion is based on a number of contemporary and historical considerations, including the
overwhelming importance of tourism's continued success to ensure the legitimacy of the new regime; the close pre-Castro US-Cuban commercial history; the pressures to expand tourism in a deteriorating economy; and the political and economic stake of the large Cuban-American exile community in a successful transition to a more open society. In sum, while a continuation of a socialist regime with a strong military presence after Castro cannot be ruled out, several powerful elements will strongly encourage his successors to maintain social order and focus on economic and political policies to attract foreign investments and improve living conditions.

Impact Analysis

With greater investments and improved US relations, traditional marketing theory suggests that a liberalized Cuba could bring three product categories to market (Lilien, Kodner and Moorthy 1992). The first would be totally new innovations like short ferry and hovercraft services from Key West or Miami to Havana where tourists and visiting friends/relatives could bring their cars to drive in Cuba, and urban tourism, capitalizing on Havana's vast resources, world famous music, and architectural styles. Cuba is also likely to develop new tourism brands by entering an established product line already in existence. Given its experience with all-inclusives, Cuba could easily move into the more upscale and specialized market segments, and compete more directly with islands like Bermuda and Turks and Caicos. With selective investments, because of its size and biodiversity, it could also develop ecotourism attractions that will challenge even mainland places like Costa Rica (Linden 2003), become a winter golf destination (Friedman 2000) rivaling the Dominican Republic, and given its proximity to Miami and plentiful deep harbors establish itself as a major cruise ship hub competing especially with Puerto Rico (Henthorne and Miller 2003). A final category would involve simple extension of existing product lines by offering new "models" or "styles" of the same basic product in its various keys and smaller islands. These offers will tend to compete with comparable, middle-of-the-road destinations.

Products in these three categories will compete differently with various Caribbean destinations, but in theory and in practice Cuba might contend with every destination in the region. Historical links, the curiosity factor, and proximity to the US mainland will significantly influence "early sales" and potential diversion from competitors depending on the extent of turmoil associated with a change in government. Its ten international airports and its national airline (Cubana) give it a strong transportation advantage over most Caribbean destinations. Once the transition is complete, one would expect a "sales" profile that rises sharply in the early stages of product introduction, then peaks, and falls off to some equilibrium level determined, among other things, by the ability of other destinations to lure back repeat tourists, as well as by the competitive reactions and countermoves of their key rivals.
Three recent studies provide a useful starting point for determining the quantitative impact of Cuba's tourism developments after Castro. Lacking a comparable benchmark analysis, they employ eclectic projection methods involving historical trends, expert opinion, and characteristics from close Caribbean rivals. The first was a comprehensive analysis conducted by the US International Trade Commission staff in response to a request from the House Committee on Ways and Means of the US Congress to examine the economic impact of sanctions on Cuba (ITC 2001). The other two were prepared by the Brattle Group (Robyn, Reitzes and Church 2002) and by analysts at the University of Colorado-Boulder (Sanders and Long 2002) in response to requests by the Center for International Policy and by the Cuban Policy Foundation, respectively.

In each report, an effort is made to project the various effects on trade and tourism from the elimination of the embargo on US trade and travel. The International Trade Commission’s report uses a gravity regression model, supplemented by “expert” modifications and adjustments, and shows the smallest effect on tourism because it assumes an uninterrupted continuation of the present Castro regime. While perhaps appropriate for a business-as-usual scenario, the commission’s post-transition range of 100,000 to 350,000 additional US tourists each year over the number that now travel there appears extremely conservative. In spite of Cuba’s proximity and pent-up demand conditions, the US International Trade Commission projection represents less than 4% of the nine million annual US tourists to the Caribbean (Table 4), far below its earlier share in the 50s. The report mentions no diversion impacts from other destinations in the Caribbean except for a brief reference to Puerto Rico.

The other two reports estimate much larger numbers, but are less clear on specific assumptions about the economic and political conditions that might prevail. For example, Sanders and Long (2002) do not state whether private ownership would be allowed in any of their scenarios or whether “joint ventures” between the Cuban regime and the investors would be mandatory, restrictions that in the past have inhibited foreign ventures and drawn concern from the European Union. Under their most favorable forecast, by the end of a five-year transition, some 3 million Americans would travel to Cuba annually. This is based on two conjectures: one, Cuba would regain the 20% share of total Caribbean tourists enjoyed in the 50s (Marlbona’s actual 1959 estimate is closer to 30%—Table 1); and two, Americans would comprise roughly 70% of the Cuban total as they do at similar destinations today (with only Cancún, Mexico cited). Additionally, based on a questionnaire sent to travel agent “experts,” they estimate that half of the new US tourists going to Cuba would be diverted, implying that almost one of every five now going to the other islands would be deflected to Cuba (roughly 1.5 million out of 8 in 2002), and would cause major short-term dislocations for these destinations.

The third report (Robyn et al 2002) estimates that 3.2 million US tourists would visit Cuba post-embargo. This estimate is based on the patterns of travel back to the Dominican Republic by Dominican-Amer-
icans and on the travel patterns of Canadians to Cuba as a percentage of the population of this generating market. Specifically, the authors assumed that US-resident Cuban-Americans would, on average, return to visit at 80% of the rate of Dominicans. Moreover, since one percent of all Canadians, or 308,000, traveled to Cuba in 2000, they applied the same rate to the US population of 280 million (or 2.8 million US tourists to Cuba). The study also assumed that 80% of these tourists (2.2 million) would be diverted from other islands. This amounts to more than one of every four US citizens who visited the Caribbean in 2002, implying an even larger impact.

However, these estimates appear optimistic on two counts. First, nearly all of Cuba’s recent growth in arrivals has been due to increasing numbers of Canadians and Europeans, and neither of these two last projections above takes into account the expected continued growth of these non-US tourists. In addition, neither study provides a hotel capacity analysis to justify whether the forecast expansion of demand can be feasibly supplied. Therefore, a more conservative approach is followed and justified below.

Classic duopoly theory from economics (Schelling 1960) or dyadic competitive interactions or impact of competitive entry in marketing theory (Baum and Korn 1999; Mahajan, Sharma, and Buzzell 1993; Simon 2005) provide theoretical insights about brand new entries into existing markets and about firms that engage in more than one distinct product or geographic market. However, none of these literature streams is a good match for the impact analysis in this paper. The Cuban situation is unique in many respects, and by extension, so is its impact upon its Caribbean neighbors. The embargo on US-resident travel is tantamount to a situation where a principal group of customers (US tourists) is prevented from buying the product of one producer (travel to Cuba), while being able to buy that of all of their competitors (travel to all other Caribbean destinations).

The projections and the simulations shown in Table 4 are based upon recent growth trends shown in Table 3, adjusted where necessary by specific information about the plans and developments at individual destinations derived from author interviews and from a variety of sources such as the Caribbean Tourism Association, the World Tourism Organization, and local publications and newspapers. Examples are the Dominican Republic’s recent efforts to attract US tourism or the aggressive development plans in the Turks and Caicos, which suggested a different trajectory than the one solely implied by the historical trends. Additionally, the forecasts and simulations were shared with several interviewees for their reaction and impressions. A five-year, post-embargo transition is assumed, with the 2004 tourism levels (the most recent year for which complete data are available) used as the base year.

It is further assumed, in contrast to the studies cited above, that Cuba would continue attracting Canadian, European, and Latin American tourists during the transition, but that it would increase its share of US tourists during the first five years after Castro. Based on these considerations, Cuba is projected to attract 2.3 million new or additional
Table 3. Regressions: Natural Log of Tourist Arrivals as a Function of Time

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% annual</td>
<td>% annual</td>
<td>% annual</td>
</tr>
<tr>
<td></td>
<td>β change</td>
<td>Adj R sq.</td>
<td>β change</td>
</tr>
<tr>
<td>Aruba</td>
<td>0.0672</td>
<td>0.27</td>
<td>0.1497</td>
</tr>
<tr>
<td>Bahamas</td>
<td>0.0865</td>
<td>0.09</td>
<td>0.0882</td>
</tr>
<tr>
<td>Cuba</td>
<td>0.1322</td>
<td>0.27</td>
<td>0.1467</td>
</tr>
<tr>
<td>Dominican Rep.</td>
<td>0.1167</td>
<td>0.59</td>
<td>0.1893</td>
</tr>
<tr>
<td>Mexico</td>
<td>0.0500</td>
<td>0.58</td>
<td>0.0480</td>
</tr>
<tr>
<td>Jamaica</td>
<td>0.0435</td>
<td>0.28</td>
<td>0.0762</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>0.0719</td>
<td>0.03</td>
<td>0.1190</td>
</tr>
<tr>
<td>ROG-Upscale</td>
<td>0.0135</td>
<td>1.5</td>
<td>0.0235</td>
</tr>
<tr>
<td>ROG-Middle scale</td>
<td>0.0010</td>
<td>0.46</td>
<td>0.0017</td>
</tr>
<tr>
<td>ROG-Low scale</td>
<td>0.0277</td>
<td>4.8</td>
<td>0.0857</td>
</tr>
<tr>
<td>Total</td>
<td>0.0473</td>
<td>4.8</td>
<td>0.0509</td>
</tr>
<tr>
<td>Total less Cuba and EU</td>
<td>0.0299</td>
<td>5.8</td>
<td>0.0547</td>
</tr>
</tbody>
</table>

Note: All estimated coefficients (β) are significant at the .05 level except for Bahamas (all periods), ROG-Low scale (94-94), and ROG-Middle scale (all periods), which are not significant. ROGs “Rest of Caribbean” and “upscale, middle scale,” and “low scale” refer to the level of tourist spending. Annual percentage change calculated by raising e to the β power.

US tourists each year by the end of the five-year, post-embargo, free-market transition as well as to continue to attract an additional 2.5 million non-US tourist annual arrivals from Canada, Europe, and other places of origin. Put differently, the opening up of Cuba to US tourism would double annual arrivals by the end of this period.

Econometric estimates of the elasticity of substitution strongly suggest that Cuba and other Caribbean destinations would be close substitutes (Divisekera 2003; Durbarry and Sinclair 2003; Linn 1997; Witt and Witt 1995). Based on interviews with hotel managers and on factors discussed in other reports, it is estimated that up to two-thirds, or 1.6 million, of the 2.3 million new US tourists would be diverted from other Caribbean destinations. This diversion factor of two-thirds falls in the middle of the projection range made by previous researchers and represents a consensus of several CEOs and senior hotel managers doing business throughout the Caribbean when they were asked in personal interviews to estimate the likely diversion impact. Finally, according to Table 4, stay-over tourists to the Caribbean are projected to increase from 18.8 million in the base year (2004) to 23.4 million by the fifth year, just under 20% for the period, somewhat conservative given recent trends.

To establish more rigorously if Cuba could be expected to accommodate such growth from the base year, the following calculations were made. First, during the base year, 2 million tourists stayed an average of 10.5 nights and demanded 21 million bed nights (WTO 2006).
Table 4. Stay-Over Tourist Projections and Diversion Analysis*

<table>
<thead>
<tr>
<th>Country</th>
<th>All Tourists</th>
<th>% total</th>
<th>All Tourists</th>
<th>% total</th>
<th>US Tourists</th>
<th>US Tourists</th>
<th>% of US</th>
<th>Percent</th>
<th>Diversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puerto Rico</td>
<td>1280</td>
<td>7</td>
<td>1500</td>
<td>8</td>
<td>1350</td>
<td>8</td>
<td>1235</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Mexico</td>
<td>2680</td>
<td>13</td>
<td>2810</td>
<td>15</td>
<td>2100</td>
<td>12</td>
<td>2010</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>Bahamas</td>
<td>1372</td>
<td>9</td>
<td>1490</td>
<td>9</td>
<td>1450</td>
<td>9</td>
<td>1400</td>
<td>9</td>
<td>15</td>
</tr>
<tr>
<td>Jamaica</td>
<td>1382</td>
<td>8</td>
<td>1500</td>
<td>8</td>
<td>1425</td>
<td>8</td>
<td>1405</td>
<td>8</td>
<td>15</td>
</tr>
<tr>
<td>Dominican Rep.</td>
<td>3444</td>
<td>10</td>
<td>3900</td>
<td>11</td>
<td>3610</td>
<td>10</td>
<td>3570</td>
<td>10</td>
<td>13</td>
</tr>
<tr>
<td>Cayman Islands</td>
<td>607</td>
<td>4</td>
<td>646</td>
<td>4</td>
<td>638</td>
<td>4</td>
<td>630</td>
<td>4</td>
<td>13</td>
</tr>
<tr>
<td>Aruba</td>
<td>731</td>
<td>4</td>
<td>773</td>
<td>5</td>
<td>749</td>
<td>5</td>
<td>740</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>Belize</td>
<td>793</td>
<td>4</td>
<td>820</td>
<td>4</td>
<td>800</td>
<td>4</td>
<td>780</td>
<td>4</td>
<td>13</td>
</tr>
<tr>
<td>Curacao</td>
<td>560</td>
<td>3</td>
<td>600</td>
<td>3</td>
<td>580</td>
<td>3</td>
<td>560</td>
<td>3</td>
<td>13</td>
</tr>
<tr>
<td>Total</td>
<td>18795</td>
<td>100</td>
<td>22475</td>
<td>100</td>
<td>21275</td>
<td>100</td>
<td>2066</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Note: All tourist figures are in thousands and based on CTO figures for stay-over tourist arrivals. The 2004 (base year) data was estimated/projected based on preliminary figures (CTO 2004). # indicates diversion and all other Caribbean destinations not named in Table 6. The “All Tourists Year Five (BD)” value for Cuba excludes the 1.5 million to be

Thus, its 86,500 total available beds were occupied at the 1994–2004 average of 67% (WTO 2006, 2001, 1997) for 245 days (365 x 0.67), resulting in the 21 million bed-night demand for that year. By year five, it is projected that Cuba would have a total of 4.8 million stay-over tourists, including 2.5 million from the United States and 2.5 million from elsewhere.

In estimating additional demand for hotel rooms, it is conservatively assumed—given existing familial bonds between the Cuban population and its diaspora, as well as the short (and low-cost) travel distance from the US mainland—that roughly one in four (26% or 600,000) would be returning Cuban-Americans. It is further estimated that two-thirds or 400,000 of those returning would not need hotel accommodations since, similar to what obtains in Puerto Rico (CTO 2003:198), they would stay in private residences. The remaining 1.9 million US tourists are projected to stay in hotels an average of five nights. This is down from the current US average in the Caribbean of approximately seven nights (Duval 2004) but within the middle range of other Hispanic and competitive destinations attracting large numbers of US tourists: Cozumel 5.6 nights, Bahamas 5.8, Cancún 4.6, Puerto Rico 2.5 (CTO 2003). Thus, these 1.9 million would require 9.5 million bed-nights. It is relevant to observe that a large number of Cuban-Americans have fewer close relatives remaining in Cuba because their exiles began in the early 60s. This group of early exiles, who account for almost two-thirds of all Cuban Americans, as well as their children and grandchildren, are thus more likely to behave as regular US tourists in terms of hotel requirements; this would increase the demand for rooms.
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The 2.5 million other non-US tourists were assumed to stay an average of nine nights requiring 22.5 million bed-nights. This reflects the longer vacation stays of Europeans and Canadians, but is also somewhat lower than the historical average (10.5) as an adjustment for increasing crowding and security issues during the transition. As a result, the total demand for bed-nights is projected to be a grand total of 32 million. Thus, an additional 11 million (32 minus the existing base year total of 21) would be required. Hotel capacity would need to increase by roughly 50% over base-year levels to accommodate this additional influx. This conclusion is derived as follows: 11 million new bed-nights demanded at the previous decade average annual occupancy rate of 67% (246/365) would require about 45,000 additional beds or 22,500 (45,000/2) new rooms. Over the five-year period, this would imply an additional 4,500 per year or roughly six or seven medium-to-large hotels per year, a significant though feasible annual capital investment of between $225 and $315 million per year, assuming a per room cost of $50-$70 thousand, the going rate in the Caribbean (interviews with hotel managers). Although roughly double the annual rate of room growth over the 1994-2004 period, this level of expansion is evocative of the annual growth in Cuba during the early 90s when the government mounted major tourism investment programs without US investor participation (Martín de Holan and Phillips 1997:785) and, according to Henthorne and Miller clearly within “the official target pace of construction [of] 4,000-5,000 rooms per year” (2003:84).

The estimates of Cuba’s post-Castro impacts are thus grounded on recent trends and on averages or norms for this most tourism-penetrated region in the world. Given that it can compete with any surrounding destination, it is assumed that it would deflect or divert US tourists proportionately from its Caribbean neighbors (based on their respective proportional shares of US tourists). These American shares were assumed to remain the same in year five as in the base year; the shares (minus Cuba) were then multiplied against the total deflection figure of 1.6 million US tourists to calculate each destination’s diversion to Cuba. Finally, the percentage impact of this diversion on total tourists estimated in year five for each destination was calculated (last column of Table 4). To illustrate, since Mexico (Cancún and Cozumel) was projected to have just under 25% of all US tourists (excluding Cuba) to the Caribbean in year five, its share of the 1.6 million US tourists diverted to Cuba would be about 360,000 (23% of 1.6 million). This would result in an 11% decline (360/3200) in total tourists to Mexico estimated for year five.

Study Results

To provide a context for the impact estimates, strategic group maps are presented in Figures 1-4 visually tracking changes in Caribbean tourism over the past two decades. They highlight the emergence of the Dominican Republic and the resurgence of Cuba using averages
for five-year periods or pentads, ending with 2004. On the vertical axis, the average economic level of the destination is shown, showing
low-, middle-, and upscale, depending on average spending at the destination. The horizontal axis shows the language spoken at the destination. The circles represent individual destinations or countries; their diameter is in proportion to the total number of arrivals (or to the size of its market share). The maps thus highlight the particular niche within which rivals are positioned in this competitive space. Comparing the 1985-89 pentad with the five-year periods for 1990-94, 1995-99, and 2000-04 underscores the rise of some destinations and the decline of others. The striking gains for Cuba and the Dominican Republic in market share are offset by declines for Barbados, Bahamas, Bermuda, Netherlands Antilles (mainly St. Maarten), the US Virgin Islands, and even Mexico. On the other hand, Puerto Rico maintained market share over the two decades.

Approximately half of all stay-over tourists in Caribbean destinations each year are US tourists; nearly three-fourths of cruise ship passengers are US residents. Nearly 75% of these frequent only six destinations. The opening of Cuba to them is anticipated to alter current trends, and results from the projections and the diversion analysis confirm it. Between the base year and the completion of the five-year, post-embargo period, all destinations in the region except the Dominican Republic would lose at least some market share to Cuba (Table 4).

The Dominican Republic, which has been increasing tourism levels rapidly, has also been making special efforts to increase the number of US tourists by significantly increasing marketing expenditures there for this purpose. (The projections in Table 4 assume a slight increase

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**Figure 3. Strategic Group Map of Tourist Arrivals (1995-1999)**
in the percentage of US tourists for the Dominican Republic). However, marked declines are projected for the combined Mexican destinations (Cancín and Cozumel), the Bahamas, and Bermuda. Other major destinations like Jamaica, Cayman Islands, and the US Virgin Islands, also are projected to lose market share. Cuba would experience a doubling in market share from 11 to 22% by the end of the transition period.

Cuba’s growth would be fueled by pent-up demand and by US tourists’ diversion from competing destinations. According to Table 4, the diversion would amount to roughly 400,000 per year in Mexico and to 200,000-300,000 annually for Puerto Rico, Bahamas, Jamaica, and the Dominican Republic. The negative effect on overall visitation levels is projected to be substantial, averaging 10% for all Caribbean destinations. As expected, the biggest declines are forecast for the large resort areas like Mexico, the Bahamas, and Puerto Rico, as well as those highly dependent on the US market like the Cayman Islands, Bermuda, and the US Virgin Islands. Diversion is less of a concern for the small rest of the Caribbean islands and destinations more dependent on European and other tourists like the Dominican Republic and Netherlands Antilles.

These estimates should be viewed more as simulations than as forecasts because they rely on three important assumptions: One, potential infrastructure and amenity bottlenecks will not seriously curb Cuba’s post-embargo growth; two, its tourism industry can successfully meet the international resort standards that the competitive Caribbean

![Figure 4. Strategic Group Map of Tourist Arrivals (2000–2004)](image-url)
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demands; and, three, during the five-year horizon, the defensive reactions of its rivals do not significantly alter its growth path. The latter might include expanded marketing, attractive room and airline discount packages, and price competition. Over the longer term, these assumptions become increasingly less tenable. The estimates also ignore the special peculiarities of individual destinations. For example, the high level of visiting-friends-and-relatives travel for Puerto Rican Americans might reduce diversion from Puerto Rico. Further, if the "all-inclusive" and low-price character of Cuba's mass tourism style is expanded over the transition, this could cause greater diversion than those estimated for close rivals like the Dominican Republic, Jamaica, and St. Lucia, and smaller impacts for the less "all-inclusive" Cancún and Cozumel. Likewise, Bermuda's upscale image and geographical distance might markedly reduce its estimated exposure.

Crowding and political or social turmoil in Cuba during the transition period would also affect the impact estimates. However, if it initiates development of some of its superlative ecotourism and marine assets, some small, similarly endowed destinations like Belize, Bonaire, Dominica, and St. Vincent and the Grenadines will be materially affected. Beyond these considerations, the presence of a national airline gives Cuba an important competitive advantage in transporting tourists that most other Caribbean nations and destinations do not enjoy. The overall analysis suggests the lifting of the US travel and trade ban, coupled with liberalization of Cuba's government and economy, will affect Caribbean competitors negatively across the region in the short run.

These results corroborate expert impressions obtained during structured interviews conducted by the senior author during 2002 and 2003 with a dozen CEOs and senior managers representing the major European hotel chains operating in Cuba and the region. The majority expected that Cuba's opening up would have "a major impact," though invariably they linked that outcome to a fairly major, free-market overhaul of its economy. One CEO described the post-Castro tourism scenario as an "avalanche," favoring this destination in the short run. Hotel managers also felt that rapid investment would be forthcoming given a "herd mentality" that operates in the resort sector, and that it would be crucial for the Dominican Republic, Jamaica, and other Caribbean competitors to focus on customer loyalty and product differentiation to soften or offset the impact.

CONCLUSION

This paper presents a comprehensive examination of Cuban tourism integrated within the larger Caribbean landscape. Regional history reveals that the country has been and will continue to be a major force in the industry, and that the source of its importance lies primarily in its long-standing close economic, historical, and cultural ties with the United States. This is also the first study to simulate quantitatively the fu-
ture of tourism in Cuba and elsewhere in the Caribbean in a post-Castro world. It argues that the resumption of US outbound tourism to and investments in Cuba, after an assumed five-year economic and political transition, would propel it to its former prominence as the top insular destination in the region, a position it held briefly in the late 50s before Castro. Specific results indicate Cuba’s resurgence among US tourists and investors would accelerate market trends already underway favoring the Hispanic Caribbean. It would be fueled by 2.3 million new US tourists to Cuba each year, of which 1.6 million would be diverted from other Caribbean destinations. Such deflections would have major impacts on most of its competitors, particularly in Bermuda, Bahamas, Mexico, Puerto Rico, and US Virgin Islands. Thus, this analysis verifies that the widespread concern about the post-embargo effects on surrounding destinations echoed in the press and repeated in the senior author’s interviews with major hoteliers across the region seems warranted.

These projected impacts rest on a foundation of plausible but uncertain assumptions. First, although there are recent precedents, the feasibility of another major increase in Cuba's room capacity over a relatively short period assumes that noncompetitive legal and other barriers to US-Cuban trade and investment can be eliminated quickly. Second, the diversion of two-thirds (1.6 million) of the new US tourists to Cuba from other Caribbean destinations is based on an estimated consensus of recent research and expert regional opinion. To the degree that this ratio is too high, negative impacts on Cuba's competitors would be lessened. However, econometric estimates of the elasticity of substitution among similar destinations strongly indicate that Cuba and the other Caribbean destinations would be close substitutes. Third, the diversion estimates are based on current US shares of the respective resort areas projected into the future. If this distribution is altered, for example, by relative price changes, exchange rate swings, or natural disasters over the transition period, particular destinations will be differentially affected (Durbury and Sinclair 2003). Similarly, the ceteris paribus impact estimates do not incorporate rival countermoves to retain market share (such as intensive marketing, discounting, new products, and new alliances) and strengthen customer loyalty during Cuba's ascendancy. To the extent such strategies are effective, they will alter the results of the simulations.

Nonetheless, despite the uncertainties inherent in these projections, the impacts presented provide a regional framework for addressing the challenges posed by the opening up of Cuba to US tourists and investors. For Cuba, given the scale of change suggested in the foregoing analyses, these impacts will include inevitable strains on a fragile tropical environment and on the country's social fabric, as well as on a political system in major transition. For Cuba's competitors, they imply adjusting to the new realities of Caribbean tourism and, in an increasingly globalized industry, mounting renewed efforts at regional cooperation and coordination—tasks that will be as necessary in the future as they have been difficult to achieve in the past.
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