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THE EVOLVING SERVICE CULTURE OF CUBAN TOURISM: A CASE STUDY

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The case examines the impressive growth of tourism in Cuba. It analyzes tourism development in a society striving to navigate its way economically amid numerous social and political challenges. The Cuban experiment with tourism is a short-term mega success. However, it is highly uncertain whether long-term sustainability can be maintained without the appropriate managerial changes at all levels. This paper highlights challenges in the tourism employment sector – training, supervisory issues, and performance evaluation, within a centrally-controlled bureaucratic system. Of specific interest is the disconnection between the natural hospitality of the Cuban people and low levels of tourist satisfaction stemming from a lack of professional hospitality. The paper concludes by focusing on the high relevance of the Cuban cultural identity as a key motivator undergirding the demand for tourism. However, with the rapid growth of tourism, strains are occurring in the cultural realm, thus requiring immediate policy intervention for sustained positive results.

Keywords: *Tourism in Cuba, tourist satisfaction.*

JEL Classification: *L83, M1, O1*

TOURISM IN CUBA

Cuba is poised to become the next big destination within the Caribbean (WTO, 2007). Cuba's first tourism zenith in the 1950s is well-known, as is the industry's collapse following the U.S. economic embargo, initiated in the 1960s. The "new age" of Cuban international tourism development dates to the mid-1970s, but gained new urgency as



the country entered the “Special Period” of economic near-collapse, following the fall of the Soviet Union, in the late 1980s and early 1990s. During the 1993-94 timeframe, policy-makers targeted tourism, the sugar industry, and biotechnology the most promising in terms of long-range economic development. Thus, being one of the select national economic initiatives, Cuban tourism achieved considerable development support during the 1990’s. By the mid 90’s, tourism surpassed the sugar industry as the primal source of Cuba’s hard currency. Cuba travel and tourism capital investment is estimated at CUP1,154.7 mn (US\$1,154.7 mn), which is 16.7% of total investment in 2007. By 2017, this should reach CUP1,890.5 mn (US\$1,890.5 mn), which accounts for 16.9% of total investment (WTTC, 2007). Despite the prevailing difficulties, this sector is the only one that exhibited an annual growth rate of nearly 20 %. (Henthorne and Miller, 2003).

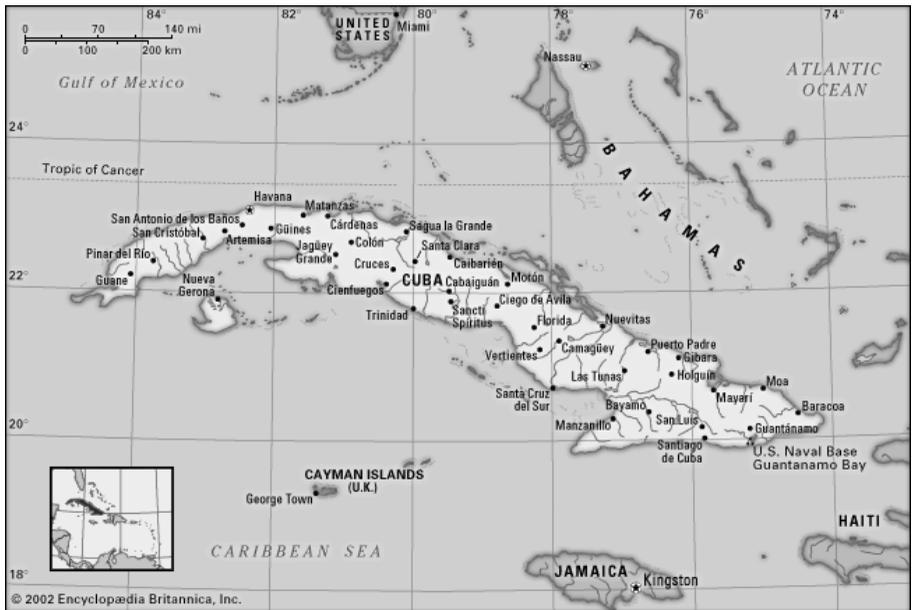


Figure 1. Map of Cuba

For the last three years, Cuba has consistently exceeded two million visitors annually, with the overwhelming majority from Canada, U.K., Spain, Italy, Germany, France, and Mexico, in descending order (Cuban

Portal of Tourism, 2007). The 20% growth rate in Cuban tourism far exceeds the World Tourism Organization's prediction of a 4-6 % increase in international tourism, coupled with a 6% increase in average tourism expenditures. For the year 2006, the average growth in international tourism arrivals globally remained approximately 4.5% (WTO, 2007). According to an estimate by WTTC (2007), Cuban tourism is expected to generate CUP5,348.3 mn (US\$5,348.3 mn) of economic activity in 2007, growing in nominal terms to CUP9,525.2 mn (US\$9,525.2 mn) by 2017. With such a phenomenal growth record, the Cuban tourism industry has assumed a pivotal position in the national economy.

However, the haste to expand Cuba's international tourism industry in the early years, spawned many mistakes, including sub-standard construction, uncontrolled sex tourism, tumultuous relations with international investment partners, and poorly trained service staffs (Martín de Holán and Phillips, 1997). Power brokers, both legitimate and illegitimate, took advantage of the chaos that ensued during this period of unplanned and rapid growth. Economic changes with no corresponding change in the political system reduced the overall efficacy of the reforms. One example of the reduction in effectiveness due to the disconnect between political and economic systems occurred in the political bureaucracy. While the economic arena was progressing rapidly, the top-down-dominated vertical reporting system that characterized the political institutions remained unchanged, thus stifling further economic momentum. Cervino and Bonache (2005) make the following statements regarding the Cuban government and tourism – “the state retains a predominantly guiding role in economic production and this directly affects the implementation of western style management processes and systems. This limits many hotel managers in their efforts to reach efficient and effective performance.” This phenomenon is clear when you see how government planners rapidly expanded the number of hotel rooms, but with relatively little attention to other, related, supporting industries. This resulted in perceptions of less than stellar services and lapses in customer satisfaction. By some estimates, this caused the tourism industry in the early 1990s to have a multiplier effect of less than one - the country lost money for every tourism dollar it collected. Since the Cuban Ministry of Tourism (MINTUR) was not formed until 1994, it had a minimal role in conceptualizing, planning, developing and implementing a coherent tourism policy. Thus, tourism development was largely fragmented and uncoordinated across a half-dozen national quasi-state corporations.

Meanwhile, externally, Cuba faced an increasingly competitive market, both within the Caribbean region and globally. But, for the near term, prospects for Cuba's tourism growth remain almost robust. One indicator of this robustness was the attraction of a record 65,280 tourists in one day – Valentine's Day 2006. This was a first in the history of modern Cuban tourism, post 1959. Hotel capacity is another key indicator of growth in the 1990s. By 2003, the country boasted hotel capacity of 40,000+ rooms, accounting for approximately US\$20 million annual earnings. Hotel earnings increased by 15 percent in 2004. The earnings come not only from leisure tourism, but also from conventions, conferences, and other events. For instance, according to the Cuban Ministry of Tourism, Cuba organized more than 300 international events, including a couple of mega-events, in 2006. However, such growth does not necessarily translate into sustained industrial growth for the future or overall economic development for the country.

GAINING EMPLOYMENT IN THE TOURISM INDUSTRY

At a typical Cuban restaurant, you could be shown to your table by a civil engineer, your order taken by a computer programmer, and your meal prepared by an attorney. Cuba's tourism industry represents one of the best opportunities for citizens of all ages to gain some measure of financial freedom. Tourism continues to account for a dominant source of employment and foreign exchange earnings (Miller and Henthorne, 1997). The Cuban travel and tourism sector employment is estimated at 587,000 jobs in 2007, 11.2% of total employment, or 1 in every 8.9 jobs. By 2017, this should total 715,000 jobs, 13.4% of total employment or 1 in every 7.5 jobs (WTTC, 2007).

The brain-drain from the traditional employment sectors to tourism has invited considerable attention from a major cross-section of the Cuban population. Many people are abandoning their jobs as engineers, attorneys, medical and health care professionals, and teachers to work in jobs that provide immediate dollars. The majority of Cubans, regardless of their educational attainment, make fairly low wages, with employees in the tourism sector earning only slightly more. However, tourist workers have the added benefit of receiving gratuities, which can be substantial. The rapid rise in tourism has attracted a diverse employee population, enticed by the salaries and the lucrative opportunity for tips. The unofficial earnings from gratuities explain why young Cuban professionals choose to work in the tourism industry rather than their own fields of study.

Given the relative attractiveness of jobs in the Cuban tourism industry, there is a tremendous supply-demand imbalance regarding basic-level jobs as housekeepers, waiters, cooks, bartenders, hostesses, or activity directors. However, securing one of these coveted positions is a relatively onerous undertaking. Applicants looking to work in tourism must first be accepted to a Formatur School for Tourism Education. Founded in 1995, 18 Formatur Schools are dispersed across Cuba and they provide extensive training programs for current and aspiring employees in the ever-growing tourism industry. Concentrated in areas of heavy tourism, the schools focus on the specific type of tourism distinctive to a particular region. For example, the schools clustered around Varadero primarily train students to work in resort properties because of the prevalence of this type of tourist activity in this region.

Admittance to a Formatur School requires advance screening for admission. The demand for certain types of hospitality and tourism-related skill sets determine the number of students accepted into the program (Wood and Jayewardene, 2003). If local hotels need 100 waitresses, for example, only 100 students are accepted. Applicants must be high school graduates and not over age 35. In addition, the student must live in the same locale as the school and the prospective place of employment. An additional note that provides a contextual backdrop, is that for the most part those accepted into Formatur Schools typically have relatively good connections in the political system.

Regardless of their previous education (many applicants already have degrees from a four-year university), generally, students attending a Formatur School receive two years of intense training. The single exception is a one-year training period for housekeeping positions. Thirty percent of the training is devoted to theory, with the rest of the time being spent on practical applications. Many students actually work in their prospective positions, in internship-type roles, as part of their training. While in training, students receive no compensation, other than tips. During this period of close supervision, their performance in the various work settings is reported to the school. It is not unusual for a student to be asked to leave the program before completion because he or she has not met the school's standards.

This employment process is somewhat inscrutable. The duration of the training seems unduly long. Also, many hotels and restaurants are slightly over-staffed. At hotels in Havana, for example, it is not unusual to find four employees running a small snack bar in the lobby, and three or four doormen are on duty at all times, day and night. This overstaffing leads to an increase in the cost of doing business, at least from a western

management perspective. Despite this lengthy training period and heavy emphasis on staffing, service levels in Cuban hotels and restaurants would not be considered responsive from the perspective of most foreign tourists. There is a major gap between foreign tourist expectations and the capacity of the current Cuban tourism infrastructure to deliver or exceed expectations.

However, mediocre service is basically reflective of a poor professional orientation as opposed to their lack of willingness to perform. In recent advertisements, Cuban tourism authorities have begun to highlight people and service providers as the true jewels of Cuban tourism. They are projected as sincere, fun-loving, open-hearted and willing to extend every courtesy to cater to tourists' needs. In some instances, tourist service-providers may develop personal accords with tourists, even inviting visitors to their homes and offering traditional island cuisine and rum. However, the situation would further improve if the government ceased the practice of "tourism apartheid" upon its citizens. For practical purposes, the government, so as to minimize the negative impacts of tourism, keeps the population as separate as possible from the tourists thereby minimizing the positive benefits associated with these contacts as well. There are small signs that this form of tourism apartheid may be abating. In fact, current Cuban leader Raul Castro has moved in this direction by permitting Cuban citizens to stay in hotels as long as they pay in the US dollars. This is a major break with past government policy and a key step forward in making the Cuban people feel more engaged in developing the tourism sector.

At least some types of jobs in Cuban tourism have come under severe criticism. Some employees engage in selling sex and other socially undesirable services to foreigners, with the expectation that the foreigners will marry them and take them out of Cuba. The popular terminology for this is *jinetismo*, literally meaning horseback riding. *Jinetismo* is currently a hotly debated issue in Cuba and is most often seen as a consequence of tourism. It is widely perceived to be antithetical to the revolutionary narrative of global brotherhood and racial-socio equality. However, sex tourism in Cuba preceded the Castro-led revolution. In the early 1950's, Cuba was notoriously known as the "brothel of the Caribbean." The Castro government wished to eliminate prostitution tourism and the initiatives were largely successful—but only until the breakdown of the Soviet block and the subsequent Cuban economic crisis. The new hospitality and tourism education strategy released in 2003 aimed to correct the negative aspects associated with tourism and

hospitality jobs from their roots and it has begun to show some positive results.

Confederación de Trabajadores de Cuba

The majority of Cuban hotels and resorts are joint ventures with foreign investors. Except for some upper management positions, the majority of the hotel employees are Cubans. Almost all belong to one confederation of unions, the government sanctioned Confederación de Trabajadores de Cuba (CTC), which represents the 3 million union members of Cuba who are organized in 19 national unions. Union membership is encouraged, and every workplace is organized. The Cuban Revolution occurred in 1960 but it is a living reality of the work-lives of Cuban people. The Cuban union movement encompasses over 97 percent of Cuba's workers. The CTC is controlled by the Cuban Communist Party, which are also the managers of the enterprises that employ the laborers. The head of the CTC is a member of the Communist Party's political bureau, its highest body.

Views differ concerning the functions of the CTC. According to the state, the working class is in power and runs Cuban society. Unions advocate for the workers in a cooperative relationship with the socialist government. In the sectors of Cuba where workers are employed in joint ventures, the Cuban Ministry of Labor operates a special office – in some ways similar to a union hiring hall – that provides labor for foreign corporations. This practice, in effect, prevents companies from hiring workers of their choice. If a problem develops with a worker, the company must discuss it with the Cuban manager and the union. If the worker needs training or replacement, he or she must return to the Ministry of Labor office.

A recent report by the U.S. State Department presents another fresh perspective. Foreign investors who engage in joint ventures with the Cuban government find themselves carefully controlled. As noted, investors must hire their workers through state agencies. The Cuban government appropriates about 95 percent of the salaries of these workers and pays them in domestic currency while charging the joint venture in hard currency. It is the CTC's responsibility to ensure that government production goals are met. The CTC does not act as a traditional trade union, promoting worker rights or observance of labor law and it does not protect the right to strike.

Workers who attempt to engage in non-governmental union activities face government harassment and persecution, even though the state disclaims these practices in international forums. Workers have lost their jobs for their political beliefs, including refusal to join the official union. Although several small independent labor organizations have been formed, they function without legal recognition and cannot represent workers effectively.

Pax Christi International, a non-governmental peace movement, has extensively studied Cuban labor practices in tourism and has in its report vehemently criticized certain aspects of the same. There is a long list of criticisms of Cuban labor practices. Some of the more egregious areas of labor concerns include: (1) the lack of the right to choose the place of employment, the nature of such employment, wages to be received for said work; (2) no rights to select their own labor unions or to strike or to ask for better working conditions or to criticize working conditions or supervisors; (3) Cuban workers are prohibited from freely negotiating wages.

Additionally, Cuban workers lack the right to open their own businesses, must not employ more than four people (all of whom must be relatives). Cuban workers must perform non-paid work and attend long political rallies as directed by the Communist Party. Workers are encouraged to spy on their neighbors and to report activity that is perceived as counter to the Party's directives. Pax Christi International also notes that, the foreign companies that invested in Cuba, instead of being a force against Cuba's repressive policies, actively encourage further human rights violations by their refusal to include codes of conduct or best business practices which would protect the rights of their Cuban employees (Source: Pax Christi Cuba Report-Tourism, 2000).

Government travel and tourism operating expenditures in Cuba in 2007 are expected to total CUP188.9 mn (US\$188.9 mn) or 5.7% of total government spending (WTTC, 2007). While this is a significant amount, there is no conspicuous improvement in the material conditions of the genuine stakeholders of tourism – the workers. Perceptible changes in labor, social, and political policies impacting the tourism industry, would necessarily have led to more efficient and effective outcomes in the tourism sector and thus, the entire Cuban economy. The multiplier effect of government changes would have sparked a more orderly and better-managed approach to the burgeoning tourism arena.

TOURISTS' PERSPECTIVES

In part because of U.S. government restrictions to travel, American citizens typically do not think of Cuba as a viable vacation alternative. Contrarily, the Cuban government welcomes U.S. citizens - even going as far as to not stamp U.S. passports at immigration. Given the U.S. travel constraints, the vast majority of Cuba's tourism comes from Europe, Canada, and Latin America. It is obvious that the Cuban government is going to great lengths to ensure that tourism continues to grow. The question that has not been broached until recently is 'how do the tourists feel about their travel experiences in Cuba.' One of the coauthors of this case conducted a short survey on customer service while visiting the country in the early 2000s. Potential survey participants were identified and approached in the lobbies of various Cuban hotels (primarily in Havana and Varadero). A total of 130 potential participants were approached. This convenience sampling method resulted in 90 individuals agreeing to answer questions regarding their tourist experiences in Cuba, yielding an effective response rate of approximately 70 percent.

Respondents were asked to rate the service they received in restaurants and hotels. The survey also asked questions about their travel experience, their language skills, and where they stayed while in-country. Additionally, respondents were asked to relate any other experiences they had encountered while in the country. The majority of the surveys took place in Havana. Seventy-five percent of those surveyed were visiting Cuba for the first time. About 80% of those tourists were well-traveled. Most of them had been to Europe, Latin America, and North America, while 36% had also traveled to Asia, Africa, and other locations. Only 39% of those surveyed spoke Spanish and 94% of the Spanish-speaking tourists felt like facility with the language enhanced the probability of receiving much better service. About three-fourths of the tourists were between the ages of twenty-five and fifty-five.

When asked to rate the quality of service received on a scale from 1 [poor] to 5 [excellent], those surveyed rated the overall quality of service at 3 [moderate]. Interestingly, a large percentage of return visitors to Cuba believed service had improved since their previous visit. Some indicated that for the most part service was not fast, but at the same time they had limited expectations in this third-world country. A male respondent from Greece was surprised that Cuba was not more developed. One female respondent stated that waiters and other restaurant workers worked very hard and succeeded in providing her vegetarian dietary requirements. This same respondent encountered problems locating

information about tours and felt that the noise level (music volume) was far too high, especially at night. Others voiced extreme displeasure about food quality and service, thus leading them to rule out a return visit to Havana. Some referred to the hotel and restaurant staff as being lazy and indifferent. While others said that the help seemed "scared" or "shy" which made them appear non-helpful—when in fact they may just be confused. A man from the U.K. said that the "Cuban people have too deep a sense of the importance of their own dignity to become good service-sector employees in much less than a generation." However, one tourist observed that Havana employees seemed more motivated to provide quality service, relative to service-providers in the more rural areas of the country.

Still others enjoyed the city of Havana, their hotel and its people. However, they perceived the city of Havana as dirty and crowded. One respondent compared it to Harlem in the United States. An Italian respondent stated that he and his wife could not wait to leave. Some were shaken by the living conditions of the people in Havana. Others experienced trouble because of the language barrier. For the most part, tourists believed Cuba was learning about tourism and that the country was trying hard to improve the tourism industry and infrastructure. Some indicated that while the service was less than expected, the helpful and pleasant attitudes of the Cuban people more than made up for some of the other shortfalls.

Provided below is a summary of the perceptions expressed in the customer satisfaction survey (in a scale from 1 [low] to 5 [high]):

<u>Survey Question</u>	<u>Overall Rating</u>
The service I received here was provided with a helpful, positive attitude	4
Generally speaking, service personnel anticipated my needs	3
Any requests I have are responded to in a timely manner	3
Service personnel here really know how to do their job	2
When I make a request, I am confident that it will	2

be completed to my satisfaction

Service personnel do their jobs correctly. 2

The service personnel that I deal with will really try to understand my particular situation and want to help 4

This survey, although simple, generally implies that service personnel, though wanting to be helpful, are not able to do so. This can be partially explained by the lack of proper guest services training or the absence of systems and procedures that support the service staff in successfully executing their duties and responsibilities.

A vast majority of tourists visiting Cuba are package tourists. This is a means to overcome the purported risks and uncertainties involved in traveling through a communist country (Simon, 1995). But, many free independent travelers who have experienced the joys of public transport and the cuisines of small street side restaurants in Cuba would disagree with this assessment. They believe the cushion of protection, technically called 'the environmental bubble', provided by the tour operators to their customers greatly minimizes the chances of authentic experiences. One of the problems often confronted by independent travelers used to be was the unpredictable service and lack of cleanliness of trains. To overcome this challenge, Cuban tourism authorities initiated a national tourist transportation agency, Viazul, which offers more professionally-managed tourist-oriented services to the country's principal tourist destinations via road and rail. Renting cars and drivers also represent a key means of transport for independent travelers. The availability of these services allow for more customized itineraries, including independent exploration.

One of the best things about Cuba is staying in what are known as "Casas Particulares", which is the vernacular for home stay. Tourists experiencing this form of Cuban hospitality considered Casas Particulares as one of the rare means through which one can come to know the true spirit of Cuba and its people. These home stay experiences allow visitors to learn and see the real Cuban culture that exists beneath socialist ideologies and slogans.

Cuba is a paradox of experiences leading many visitors feeling as though they have truly spent time in a place that is so markedly different from anywhere else, from both positive and negative perspectives. This perception is evident from a scan of the blogs posted by visitors to Cuba. Given that Internet connections in Cuba are unreliable, slow, expensive,

and highly censored, tourists generally post travel experiences only after they return home.

MAINTAINING A UNIQUE CULTURAL IDENTITY

Though Cuban people have grown somewhat uneasy of living in the past, they are extremely proud of their culture (Rundle, 2001). Thus, any loss of its pure identity is to be attributed to the international market pressure and the influence of a globalizing mass media. The Cuban state has slowly begun to submit more power to the civil society by allowing citizens to participate in the decision-making processes of the nation and recognizing them as consumers of universal popular culture. However, interestingly, people do not fully utilize the scope of freedom provided to them. Contrary to popular belief, the Cuban people continue to favor their system of governance and believe in the traditional ideals. They cleverly weigh up which factors of their socialist structure are superfluous and which factors must remain unaffected in order to maintain cohesion with their cultural identity.

Even these days, Cuban art hangs in every public place as ever; and, murals make the outsides of buildings come to life. Statues adorn public parks immortalizing freedom fighters of the past. Cuban music permeates through the streets of Old Havana. The market area is alive with local citizens-turned-merchants attempting to capture their portion of entrepreneurial success. A rhythm of contentment is somewhat evident as Cubans greet visitors in passing. Cubans are warm, compassionate, dignified, and immensely proud of their immediate and more long-term cultural heritage. Cubans, the majority of which are fairly well-educated, enjoy conversations with tourists and are eager to learn. The people are the linchpin to the vibrancy and sustainability of the tourism industry in Cuba. Long-term success is predicated on more effectively engaging the Cuban people in a multi-dimensional approach to tourism. A 'systems view' of tourism, with its people at the center, hold the key to strengthening the total infrastructure necessary for sustained effectiveness at both the micro and macro levels.

CONCLUSIONS

Cuba's tourism industry is of great interest – and concern – to the entire Caribbean region. Furthermore, Cuba's approach to tourism planning and development has become a model for tourism development throughout the Caribbean and beyond. It has been more than 15 years

since Cuba began to open up its beautiful landscape, beaches, culture, traditions, history, folklore, and its people to the broader world. This time frame affords a unique opportunity to take a retrospective view of tourism, as well as to set the foundation for stronger, more focused, customer-friendly initiatives leading to the prospects of more value and greater contributions to the Cuban economy and people.

The conventional view of this region is that its resources are highly homogenous: all of the islands have sun and beaches, they all compete for the same market with essentially the same product, they all grow the same crops, etc (Strizzi and Meis, 2001). Reflecting this view, the region's marketing strategies are strikingly generic and similar across the many destinations. But, as the material presented in the case clearly suggests, under socialism, Cuba has cultivated a distinctive cultural identity and its associated cultural resources. Cuba's 'brand' of tourism is unique, desirable, and heavy with potential. Sustained success of Cuban tourism depends upon projecting its distinctiveness and developing and executing systematic and systemic marketing campaigns that offer prospective visitors and unparalleled tourist experience. In addition to marketing promises, Cuba has to have an adroit customer service delivery mentality to meet the ever-escalating demands of consumers inundated with an array of tourist options around the globe. Cuban tourism must practice market segmentation at its very best. Cuba must focus on cultivating experiences that cannot be duplicated in the Caribbean or elsewhere.

The Cuban mystique is still attractive and alluring as a marketing tool. This mystique has been enjoyed mostly by non-U.S. tourists. While U.S. residents account for over half of all tourists to the Caribbean region, the number of Americans visiting Cuba is relatively miniscule (Padilla and McElroy, 2007). If political winds change, which many astute observers expect, the post-Castro era promises to open the door to the mega market in the U.S. for Cuban tourism. Tourism planners should be carefully preparing for this eventuality.

As noted elsewhere, the Cuban travel industry has prepared for various post-Fidel Castro scenarios for quite some time. The emergence of Raul Castro as leader has heightened the prospects of a 'thawing' of relations with the U.S. In preparation for a possible change in relations between the two adversaries, almost a dozen Cuban harbors have been identified by major U.S. cruise lines in anticipation of a major cruise boom. Likewise, major U.S. hotel chains, through their foreign subsidiaries, have entered into 'handshake agreements' with properties throughout Cuba. Many overseas Cuban business executives have positioned themselves appropriately in anticipation of the opening of the

doors of their motherland to waves of foreign capital (Greenberg, 2007). Professional travel agents expect that the U.S. administration will slowly relax the 'Trading with the Enemies Act' that has severely restricted U.S. tourists in Cuba for almost half a century. The 'Special Period' of scarcities and crises in the post-Soviet decade has by now forced the Cuban government to relax some foreign ownership-related laws. The current president, Raul Castro, and his successors cannot continue to ignore the enormous potential for U.S. tourists to totally remake the fabric of Cuban tourism. This is especially the case, given Cuba's urgent need to increase its foreign currency reserves. Its current national fiscal position is unsustainable in the long run. Given this complex, interdependent scenario, the future of tourism in the Caribbean is sure to be radically different from past (Clive, 2006). This also means that, along with the dramatic resurgence of Cuban tourism, the rest of the Caribbean will have to face a behemoth. Cuba has the potential to be the 'lion' in dominating Caribbean tourism, given its potential. However, Cuba's genuine resurgence as a tourism player in the region and beyond is predicated on an integrative approach by visionary strategic planners, committed to masterful implementation. Cuban tourism, in concert with other regional efforts, can reshape the power of tourism in this sector of the world. Focused, synergistic, and creative actions of all stakeholders will make a lasting imprint on the tourism landscape of this area.

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