

# THE IMPACT OF THE COVID-19 GLOBAL PANDEMIC ON THE CUBAN TOURISM INDUSTRY AND RECOMMENDATIONS FOR CUBA'S RESPONSE

## EL IMPACTO DE LA PANDEMIA GLOBAL COVID-19 EN LA INDUSTRIA TURÍSTICA CUBANA Y RECOMENDACIONES PARA LA RESPUESTA DE CUBA

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Classification: Conceptual paper

Received: July 3, 2020 / Revised: August 6, 2020 / Accepted: November 17, 2020

### Abstract

Cuba has been affected by the COVID-19 global pandemic as has most countries. The pandemic has all but shut down the tourism industry, with global flights being cancelled and governments taking drastic actions to stop the spread of the virus. The impact will especially hurt developing countries without strong economies and those heavily reliant on the tourism industry, such as Cuba. Government initiatives have included stay at home orders and temporarily closing businesses, restaurants, sports, and music venues as well as manufacturing facilities. With these shutdowns, there exists the probabilities that many businesses will not survive, but for those with sufficient cashflow, this presents opportunities for organizations and governments to re-tool, re-balance and alter their methods of operations. Cuba is different, in that they have a centralized planned economy and do have an opportunity to make significant changes to their industries which can improve the future of Cuba. The present paper looks to evaluate the impact of this on the country and the tourism industry and make economic recommendations in order for the Cuban government to move forward.

*Keywords:* Cuba, tourism, COVID-19, global pandemic, economy.

### Resumen

Cuba se ha visto afectada por la pandemia de la COVID-19, al igual que la mayoría de los países. La pandemia ha hecho que la industria del turismo se encuentre prácticamente fuera de servicio, debido a la cancelación de vuelos internacionales y las drásticas medidas impuestas por varios gobiernos para detener la transmisión del virus. El impacto será mayor en los países en vías de desarrollo que no tienen economías estables y en aquellos países que dependen mayoritariamente del turismo, como Cuba.

Las iniciativas gubernamentales incluyen órdenes de 'quedarse en casa' y de cierre temporal de negocios, restaurantes, sedes de deportes y música, así como entidades manufactureras. Con estos cierres, existe la probabilidad de que muchos negocios no sobrevivan; sin embargo, para aquellos negocios con suficiente flujo de efectivo, esto representa una oportunidad para las organizaciones y los gobiernos de equiparse con nuevas herramientas, restablecer el balance y cambiar su manera de operar los negocios. Cuba es diferente porque tiene una economía planificada a nivel central y, por tanto, tiene la oportunidad de realizar cambios significativos en sus industrias, que pueden mejorar su futuro. Este artículo se propone evaluar el impacto de esos cambios en el país y en la industria del turismo, además de presentar recomendaciones económicas para el Gobierno.

*Palabras clave:* Cuba, turismo, COVID-19, pandemia global, economía.

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## Introduction

Cuba, like the rest of the world has had a trying time dealing with the effects of the COVID-19 global pandemic. The tourism industry within Cuba, like nearly all tourism globally has especially being hit hard by the pandemic, with governments, both locally and internationally, closing borders to international travel, and severely limiting domestic travel by issuing stay at home orders.

For the Cuban economy, this has almost been a perfect storm of negative consequences. To prevent the spread of the virus, many countries have shut down businesses and implemented stay at home orders. While all businesses and countries are impacted by this due to the global spread, Cuba is feeling the shock more so than many other countries in the Caribbean as they have been hit, not only by the COVID pandemic, but are facing simultaneously, an increasing pressure campaign by the U.S. government to put a financial burden on the Cuban government in recent years in order to pressure the Cuban government into regime change. Further, Cuba is also being affected by the reduction of income from medical doctors working abroad in countries such as Brazil and Ecuador, given that many countries have begun to end these campaigns and contracts and are sending the doctors home. The situation is even further exacerbated by the 40 million unemployed Americans, which will likely have an impact of a reduction of remittances to Cuba from family members living abroad in the United States, along with decreased exports and the inherent lack of ability to pay for imports resulting from the global shutdown.

Not only have all of these elements impacted the Cuban economy currently, but to make matters worse, the Cuban economy has grown relatively slowly with the GDP growth in the past 5 years averaging just 2% with an expected 1% in 2020. Although this is higher than the expected average for the rest of the Caribbean of 0.5%, with the loss of tourism, U.S. embargos, and impacts from the export market, Cuba is much more adversely affected by this shutdown, and likely head into recessionary territory. (Pajón & Pérez, 2020).

Due to the newness of the global pandemic, this paper will contribute to the literature by evaluating the case study of Cuba, a Communist country, and the impact of the Covid-19 crisis on the tourism industry, while providing recommendations in order for Cuba, the Cuban government and its tourism industry to move forward. The paper is structured to analyse the topic of crisis management and the responses to prior crises and disasters affecting the tourism industry. Next, we analyse the Cuban tourism industry and Cuba's response to the global pandemic. We then make recommendations for the Cuban government and the tourism industry in Cuba to re-open

in a more competitive environment, and finally we provide an overall conclusion to the paper.

## Crisis Management and Tourism Industry Responses

In tourism research, there is generally an acknowledgment of a difference between a crisis and disaster, in that a crisis is caused due to some internal failure (unsystematic risk) to act such as fraud, inadequate internal or safety controls, inadequate strategy, cashflow or operational issues, while a disaster tends to be an external event (systematic risk) that the organization has no control over such as a global economic recession, a pandemic, a political crisis or an environmental catastrophe such as a tsunami or hurricane, (Faulkner, 2001; Ritchie & Jiang, 2019). Robert et al., (2007) identify a crisis as a "low probability, high-consequence event that develops rapidly and involves ambiguous situations with unknown causes and effects". The response from all stakeholders involved include a three-step process; i) planning and preparedness activities before the crisis or disaster; ii) response to, or management of, a crisis or disaster as it occurs, and iii) final resolution to a new or improved state after the crisis or disaster is over (Ritchie, 2009).

Most academic research focuses on the last 2 steps. Ritchie & Jiang, 2019 found 55% of research focused on response and recovery, while only 15% addressed a comprehensive approach, but it is recognized that as part of a well-managed crisis and disaster planning and response governance strategy, organizations and governments should plan for crises or disasters as part of an overall risk management program. This is important as decision makers trying to make rational decisions during a crisis are constrained by bounded rationality, making decisions in real-time with often limited time or information, requiring proper planning ahead of a disaster or crisis.

Risk analysis is an inherent part of a fully developed strategic plan and proper corporate governance. It includes risk identification, evaluation, and response. Forecasting risks is a difficult process of quantitative risk analysis due to the large set of risk scenarios. A risk matrix is often used whereby companies analyse separately the likelihood of occurrence of the risk against the impact of the event, should it occur. If the likelihood is low and/or impact is minimal, depending on the Board of Directors tolerance for risk, the organization would likely accept/assume the risk. As the likelihood and/or impact to the firm increases, the organization would take steps to mitigate (share the risk, transfer the risk; e.g., insurance, establish controls and contingency plans) or avoid the risk (exit the market).

Crisis management also depends on the relationship between the unsystematic and systematic risks of a firm and destination or country level. This will depend, not only on the extent of the relationship and level of integration between the two levels, but also on the scale of the country involved. A systematic event occurring in the U.S. or Europe would not have the same level of impact as Cuba or another small tourism dependent country in the Caribbean. A terrorist event taking place in New York may have a lower level of impact to the tourism market in California, than if the event occurred in the Dominican Republic. The impact would also differ based on the type of external event; e.g., terrorism versus volcano eruption.

Some events are short-lived and targeted such as a terrorist attack in Paris, a Caribbean Hurricane, whereas others, such as the September 11, 2001 terrorist attack in New York, SARS, the Ebola outbreak in Africa, or the current COVID-19 pandemic are global crises, just like the 2008 banking crisis in the U.S. led to a worldwide recession. Both tourism enterprises and governmental organizations have a role to play in developing a coordinated response to a crisis or disaster. There are often conflicting goals between both the government and the private sector tourism industry. The government must balance the need for geopolitical security, economy and social welfare, while at the same time avoiding what Cohen (2011) refers to as a “disaster capitalism” that occurred in Southeast Asia following the 2004 Tsunami as governments looked to rebuild the impacted areas by re-locating vulnerable groups away from the coastal areas, leading to the exploitation of a “land grab” post-disaster for future tourism development. Whereas, tourism operators must consider the impact of business continuity from a financial and strategic perspective, and both must consider the long-term resilience of the businesses, community, and society in order to recover from the crisis or disaster.

### **Tourist Behaviour**

Concerns from tourists depend upon the nature of the crisis or disaster. Past research has used the Theory of Reasoned Action (TRA), Theory of Planned Behaviour (TPB), or Model of Goal-directed Behaviour (MGB) to understand and model traveller intention and decision-making behaviour. Lee et al., 2012 used the MGB to analyse decision-making process of Korean international tourists in relation to the H1N1 and non-pharmaceutical intervention (NPI) such as the use of social distancing, closing schools, personal hygiene (use of masks, washing hands) and monitoring information during the outbreak in 2009. The results found that the perception of H1N1 was not a significant predictor of either the desire or

behavioural intention to travel, but it did influence their use and consideration of using NPI, which lowered their perceived threat of infection, as an adaptive behaviour (Lee et al., 2012). This was also studied in Hong Kong in 2019 and found that quarantine, isolation, distancing, and changes in social behaviour were associated with lower transmission of COVID-19 and likely reduced influenza transmission in Hong Kong, (Cowling et al., 2020). This indicates that the educational messages to tourists by the tourism and governmental agencies is important in promoting a safe environment for travel, including third-party validation systems, through tourism certifications.

Physical, psychological, mental, and health and safety risks are all concerns for potential tourists. During a crisis, the weighting associated with different risks might be altered in the tourists’ mind, such as concern for health and safety, which could lead to cancellation or postponement of visits given that the perception of the crisis exceeds the reality and is a common response from tourists. It is up to the destination and governments to revive confidence in the location in order for tourists to visit. The image of a tourist destination is critical to the decision-making process of the tourist.

### **Marketing Efforts**

Tourism industries are often negatively affected by crises or disasters as they primarily affect the decisions made by tourists to travel to different locations. In some cases, it is a personal decision, due to the risks identified on governmental websites of travel risk advisories to certain locations due to a crisis or disaster or governmental shutdowns of borders to external tourists as has occurred with the current pandemic. Much of the impact for tourists’ decision-making is based on psychological decision-making affected by destination image and reputation. To combat this, tourism destinations must provide an effective communication strategy. Crisis communication is important on the levels of emergency managers to stakeholders, between tourism stakeholders and from the destination to the tourism market for both timely and accurate information, although effective communication can be impeded due to language barriers, lack of familiarity with local regulations, and emergency evacuation orders, (Mair et al., 2016). Third party confirmation of the end of a crisis can also be crucial to the recovery messages. Delisting advisory of the SARS by the World Health Organization in Singapore transformed the messages in Asia and the Pacific region to a “welcome back” campaign. (Henderson, 2007).

The media also has a role to play in communicating accurate and timely information but have often been

accused of sensationalizing crises or disasters, which can help to bring attention to disaster relief agencies, but can have dramatic negative impacts on international tourists, such as that following Hurricane Katrina in New Orleans, or failing to follow-up on a post-crisis period, which can help re-build tourist confidence in an affected region. The use of the internet and social media by governments, new agencies and tourism organizations or destination management organizations (DMOs) is important.

Marketing post-crisis strategies is also key to assisting crisis and disaster recoveries for countries and tourism destinations. Targeted and repeated marketing messages and efforts by governments and DMOs are critical in order to correct misperceptions by tourists, depending on the nature of the crisis or disaster, and to restore confidence in the destination. Misconceptions could relate to the scale of the disaster; it is important to identify if businesses are still operational and the safety of the destination, the solidarity with the destination as well as verify visitor testimonials. In the case of COVID, this would entail identifying if businesses are operational and if safety protocols are in place to help alleviate concerns of potential tourists. Pricing strategies are also used to try to attract tourists back to destinations, but these tend to be secondary to the importance of proper messaging for tourists. A study of hotels in Spain following the financial crisis of 2008 found that hotels focusing on high quality, branding and customer loyalty had no significant impact on performance, while those cost-cutting and reducing prices suffered the most, (Alonso-Almeida & Bremser, 2013) as it might be difficult to raise the prices subsequently in the future.

In summary, it is important to have a clear, cohesive, consensus building and integrated strategy between governmental and DMO organizations which focuses on enhancing the economic viability of the tourism industry and local residents, incorporating a disaster mitigation policy, and a clear coordinated messaging system to the external tourism market in order to ensure that safety, security and destination preparedness are all explicitly communicated.

### **Global COVID Pandemic and the Tourism Industry in Cuba**

The global pandemic started in Wuhan, China and quickly spread around the world. The severe acute respiratory syndrome Coronavirus 2 (COVID-19) is a new form of the Coronavirus family of viruses not previously identified in humans. Other forms of the coronavirus which have spread from animals to humans, causing significant illnesses in humans were the severe acute respiratory syn-

drome coronavirus (SARS CoV) in 2002, and the Middle East respiratory syndrome coronavirus (MERS CoV) in 2012. Symptoms of the COVID-19 include fever, difficulty breathing and pneumonia in both lungs with an incubation period of up to 14 days, with many infected being asymptomatic, causing the spread of the disease to be exacerbated. No vaccine for the virus is expected until late 2021-22.

Wuhan is one of the principle key international manufacturing, scientific and business hubs within China. Wuhan has a population of 10.6 million people, and has three national development zones, four scientific and technological development parks, more than 350 research institutes, 1500 hi-tech companies, 230 of the fortune 500 companies investing in the area, and more than 120 higher education institutions. The main countries which import products from Wuhan include the U.S., South Korea, Netherlands, India, Germany, Japan, the U.K., Singapore, and Brazil. (Trade Commissioner Service, 2020).

Given the vast nature of commercial enterprises, there was a constant stream of business executives to the area, along with general tourists to China; therefore, it is easy to see how the spread from Wuhan to the rest of the world took place, given how contagious the virus is. In addition to this, international tourism has been increasing yearly, with China being a major destination and employing over 29 million people in the Chinese tourism industry (Statista, 2020). China's tourism industry has grown from 32 million arrivals in 2003 to 62.9 million arrivals in 2018 (The World Bank, 2020). Tourism to China is predominantly from other Asian countries, with 14.5 million from South Korea, 8.7 million from Vietnam, 5.6 million from Japan, 3.3 million from Malaysia, 1.75 million from Russia, and 1.45 million from the U.S., rounding out the top 6. Also, roughly 500,000 Canadians travel to China every year (Pariona, 2017).

In the same period, Cuba's tourism industry has grown from 1.8 million to nearly 4.7 million (The World Bank, 2020). This increase in tourism came mostly from Canada (Canada 1.1 million, U.S. 637,000, Cubans living abroad 600,000, Italy 177,000, Germany 208,000, and Russia 136,000). Many of the top tourism countries which visit China (Russia, U.S. and Canada) overlap with the top countries to visit Cuba: Canada, U.S., Russia and Italy which was particularly hard hit with the Covid-19 virus with 233,000 cases.

Due to the COVID-19 virus, the International Monetary Fund (IMF) is expecting the global economy to contract by 3 - 5.2% in 2020, which exceeds the impact of the 2008-9 financial crisis on the tourism industry. Growth is expected to decline greatest among developed

countries and less in emerging markets, but both are expecting a rebound with much more robust projections of 5.8% and 6.6% growth in 2021, depending on the ability to flatten the curve, and especially the development of a vaccine for the virus. To combat the spread of the virus, the IMF is calling for strong multi-lateral cooperation between governments as well as economic, fiscal and monetary policy support to help affected businesses, especially in vulnerable industries including tourism, travel and restaurant industries, (International Monetary Fund. Research Dept., 2020).

The tourism industry has come to a near standstill. The International Civil Aviation Organization (ICAO) has forecast that globally, airlines could lose as many as 1.2 - 1.45 billion international travellers (2.3 - 2.9 billion including domestic travel), with a reduction of 42 - 52% of seats offered costing the industry up to \$308 - \$391 billion in revenue (Department of Global Communications, 2020). Furthermore, the International Labour Organization (ILO), states that the tourism sector is responsible for nearly 330 million jobs worldwide, directly or indirectly (10.3% of total global employment), with the majority of the firms having less than 50 employees, 30% with fewer than 10 employees, and 60% of accommodation and food services, which are being particularly hard-hit financially given the shutdowns as they don't have the cashflows to sustain themselves. The ILO estimates that as many as 305 million job losses will occur, with a contraction of 45 - 70% from international tourism. (ICAO, 2020)

### **Cuba's Response to the Pandemic**

While the worldwide numbers of people affected by Covid-19 on June 1, 2020 came to over 6.2 million cases (1.15 million in China and 2.95 million in the U.S.), (ECDC, 2020), by June 24, the numbers had increased to 9.2 million cases globally. Cuba had experienced only 2,092 cases, with many of the reported cases from international tourists or Cuban nationals returning from locations where the pandemic was more entrenched, such as Italy (MINSAP, 2020). The first case of COVID-19 in Cuba was on March 11 (three Italian tourists in Trinidad). Amid the global *Return to country of residence*, Cuba's response was in line with most countries in closing its borders to foreign visitors and Cuban emigrants. It also closed its borders to all cruise ships and flights, except humanitarian and commercial reasons, and for those returning, a 14-day quarantine is imposed. To accommodate this and the outbreak across the island, each province in Cuba designated hospitals, including Cuban military hospitals as designated isolation centres for COVID patients.

On March 16, 2020, Cuba allowed the British Cruise Ship, MS Braemar, with 682 passengers and 381 crew to dock at the Mariel harbour (35 miles west of Havana), with 5 reported cases of COVID-19 and 43 passengers and crew in isolation, after they were turned away from several other ports (Pentón & Gámez, 2020). On March 24, Cuba restricted travel to allow only Cuban's presently outside the country to return to Cuba and closed its borders on April 2.

### **Cuban Doctors Working Abroad**

Cuba's response to the global pandemic was not only domestic, but also international. More than 2,000 Cuban doctors and nurses have been dispatched to more than 23 countries including Italy, Venezuela, St. Lucia, Angola, and Nicaragua to help with international outbreak hotspots in response to the COVID situation. Cuba has always had a large number of doctors working internationally, with as many as 50,000 in 67 countries, which has been a significant source of revenues for the Cuban government, bringing in nearly \$11 billion annually, representing the largest form of international revenues for the Cuban government (Nugent, 2018).

This has not only provided a large source of revenues for the Cuban government but provides an opportunity for doctors to send remittances back to family members in Cuba. Following the end of the Brazil "Mais Médicos" (More Doctors), \$200 million annual program for 8,000 doctors and the economic decline of Venezuela and the reduction in their Doctors for oil program, there was a drastic decline in the number of students that wanted to study medicine in Cuban universities. Becoming a doctor with the chance to earn a foreign currency while working abroad had always been enticing, while domestically, someone working in the tourism sector or as a taxi driver can earn more than a doctor.

While some have been calling for the Cuban medical response teams to be awarded the Nobel Peace Prize for their efforts in foreign countries, the Trump administration in the United States, in their continuing efforts to put pressure on the Cuban government through embargos and pressuring foreign allies, have described the doctors working abroad as "slaves", even accusing the Cuban government of "human trafficking" in a tweet by Secretary of State, Mike Pompeo (Pompeo, 2020). Cuban doctors were accused of helping to keep Cuban allied regimes in power and inciting violence, according to a tweet from Michael Kozak, Acting Assistant Secretary for U.S. Department of State's Bureau of Western Hemispheres Affairs. This political pressure from the U.S. government led Ecuador to send 400 Cuban doctors' home in

November 2019, while Bolivia, following the resignation of President Morales claimed Cuban doctors were paid by Venezuela to incite unrest, causing Cuba to recall the 700 doctors working there. (Krygier, 2020).

## Tourism Industry in Cuba

Cuba's tourism industry is controlled by the Ministry of Tourism (MINTUR) which coordinates their 2030 centralized tourism plan for the island, indicating the construction and control of tourism. As with many countries in the Caribbean, the tourism industry in Cuba is one of the essential drivers of the Cuban economy, representing \$3 billion Cuban convertible peso (CUC)<sup>1</sup> annually. Currently, Cuba has projected that they can accommodate as many as 400,000 hotel rooms on the island but are currently at only 17% of that capacity with 68,000 hotel rooms in 2018. There were plans to build an additional 3,800 rooms and renovate 5,000 more in 2019 (Martinez, 2019).

MINTUR also has plans to balance the different types of tourism with sun and sand tourism found in locations like Varadero with more cultural and ecotourism products in Holguin, Camaguey, Trinidad, and Pinar del Rio. These investments are part of a planned \$600 million project to include tourism, golf courses, hotels, and marinas. A key focus of MINTUR is to also address a long-time complaint of tourists and enhance communications and connectivity with Wi-Fi coverage to all hotels and even beach areas, (Martinez, 2019).

Cuba had to postpone this year's FitCuba 2020 due to COVID, an important international tourism fair scheduled for May 2020, bringing together industry investors, travel agencies, airlines, and other travel industry representatives. Having celebrated the 500<sup>th</sup> anniversary of Havana in November 2019, MINTUR was looking to build on the momentum of the past year. The plans included over 100 new projects resulting from the FitCuba 2019 including new hotels, hotel marketing and administration contracts, marinas, and theme parks, (Martinez et al., 2019).

Cuba has been very fortunate that their tourism industry is fairly steady month to month, thus they are not unduly affected by seasonal fluctuations, as they receive many travellers from Northern destinations such as Canada, U.S. and Europe in the winter months, while receiving many travellers from Southern countries in the summer months, but as always Cuba is in competition with other countries for tourism dollars.

On December 17, 2014, following the joint Obama-Castro announcement to normalize relations between Cuba and the United States, facilitating travel, re-instating bilateral relations, and opening respective

embassies, there was an immediate spike in tourism from Non-U.S. countries to Cuba (Becker, 2015). However, with the subsequent increase in U.S. tourism, up until the Trump presidency, inflationary prices in tourism started to increase, further putting pressure on the competitive positioning in Cuba relative to other tourism destinations in the Caribbean. Comparable prices for competitor countries for a 1-week all-inclusive holiday include Punta Cana (Dominican Republic) at \$972USD, Cancun (Mexico) at \$951USD, while Cuba's prices have increased to \$1,235USD, putting them more on par with mid-tier Caribbean tourism destinations like Aruba at \$1,340USD, and Ocho Rios (Jamaica) at \$1,368 (Wade, 2019). Prices have also increased for restaurants and casa particulares (room rentals) with average prices increasing from \$25 - \$35CUC/night in 2015 to \$50CUC/night in 2020, and some as high as \$170CUC. Similarly, rooms at hotels in Havana have nearly doubled in the past 5 years (Becker et al., 2017).

In the tourism sector, growth needs to be tempered with concerns for efficiency and as with the Vietnam model, targeted. Tourism in Cuba saw a large increase from 2013 with just 2.8 million tourists to 4.7 million in 2018 (Oficina Nacional de Estadística e Información República de Cuba, 2018), with a large increase following the opening of Cuba to American tourists under the Obama presidency. Despite the current Trump administration reversing many of the opportunities to travel, travel has still maintained its momentum, but decreased in 2019 to 4.3 million tourists (a drop of about 9.3%). Travellers from the U.S. dropped by 22% compared to 2018. (González, 2020).

In 2018, Cuba had 68,000 rooms of which 34% were 5-star and 50% were 4-star hotel rooms. The overall occupancy rate for Cuba averaged 49.5% overall (49.1% in 5-star hotels and 56.2% in 4-star hotels), and revenue per available room (revpar) of \$43.72 according to the Oficina Nacional de Estadística e Información - Office of National Statistics and Information (ONEI). This compares to the Caribbean average hotel occupancy of 63.7% overall with an average rate of \$213.65 and revpar of \$132.12 (Caribbean Journal Staff, 2020), indicating that Cuba is far behind its counterparts. The Cuban government is working to increase Foreign Direct Investment (FDI) to the country, however foreign investment needs to be targeted in relation to MINTUR's 30-year tourism plan and to support other industries in agriculture and small business enterprises in order to reduce exacerbating the current occupancy level problems.

Cuba has substantial room to grow and in order to accommodate this, there is a need for foreign direct investment, but there is concern amongst potential investors in response to the Trump administration enacting Title III

1 The CUC is pegged to the USD (1:1) at the current time.

and IV of the Helms Burton act, enacted in 1996 as an extension of the 1992 Cuban Democracy Act, seeking to penalize foreign enterprises which do business with Cuba (Becker, 2012). The Cuban government has responded by indicating that companies have full legal safeguards under Law 118 on Foreign Investment and Law 80 on the Reaffirmation of Cuban Dignity and Sovereignty (Martinez et. al., 2019). The impact of the Helms Burton act has impacted Cuban tourism, FDI, and cruise travel to Cuba from the U.S. enterprises was eliminated (expected to be 800,000 visitors in 2019), as well as impacting air travel to the island. The exception is for travel from the U.S. to Havana allowing Americans to travel under one of twelve authorized categories (Castro Morales, 2020).

Following the COVID pandemic and the current phasing in of businesses as countries attempt to reopen, many airlines, including Air Canada, American and Southwest Airlines have announced plans to re-introduce services to Caribbean destinations, including Cuba, in June 2020, but it is up to the government to open the borders to allow the planes to land.

### **Effects of Other Industries and Events and Their Impact On the Tourism Industry in Cuba**

For the tourism industry in Cuba to thrive, the input and support of several other industries and government agencies is required. MINTUR must work in coordination with MINAG (Ministry of Agriculture) and their UBPC and CPAs (Agricultural Cooperatives) as well as other ministries such as the Ministry of Culture and the Ministry of Foreign Investment in order to form a coordinated effort to manage the Cuban Tourism Industry. Specifically, this section will discuss three specific related areas of the tourism industry: i) Agriculture: the agriculture sector is necessary in order to support the growth, as well the private, non-state sector playing a significant role in supporting the growth of tourists through accommodation, restaurants, and transportation, ii) Private Sector: the private sector is a key element of support in order to accommodate the rapid growth of tourism in Cuba and allow for greater wealth development through spin-off effects of a growing middle class, and iii) Currency Unification: the Cuban government has been discussing currency unification for nearly 15 years, but has yet to implement unification. The impact of this will have a disruptive effect on the economy in the near term, leading to inflation which could impact the tourism industry.

#### **i) Non-State – Food and Crops**

The growth of tourism from 2.9 million tourists in 2013 to 4.7 million in 2018 has put a great deal of

pressure on the agricultural industry in Cuba. The Cuban government, through MINAG, has enacted a number of agricultural transformations since 2007, in an attempt to reduce Cuba's reliance on imports for the tourism sector, and meet the needs to the Cuban population. These reforms, announced in Decree Law No. 259 in 2008, have included transferring state-owned land to non-state enterprises (cooperatives and private farmers), as well as price reforms. Agriculture accounts for about 20% of Cuba's GDP and 21% of employment, either directly or indirectly through transportation and food processing. (Nova & González, 2015). The agricultural sector has also played a significant role in renewable energy on the island through the generation of electricity using bio-fuels and biogas.

Increased efficiency and better utilization of the private sector is needed to enhance the productivity of this sector. This is imperative, to not only reduce Cuba's reliance on imports to sustain the tourism industry, but to also have the opportunity to expand production to support the local population food needs and reduce potential inflationary pressures in the sector, despite the government setting official prices.

#### **ii) Private Sector Small Business (Cuentapropistas) Support**

In April, 2011, the 6<sup>th</sup> Congress of the Communist Party of Cuba introduced the *Linamientos de la Política Económica y Social del Partido y la Revolución* (Social and Economic Policy Guidelines of the Party of the Revolution) implementing progressive economic reforms which allowed for the significant expansion of private sector enterprises in order to support small businesses in the Cuban economy (Cuentapropistas), (Becker et al., 2014). Originally, 250,000 small business licenses were granted by the Cuban government in nearly 200 specific occupations to limit the migration of Cuba's citizens (especially young families) to foreign countries. Cuba faces a serious challenge with more than 19% of the population of 11 million exceeding 60 years of age and with low birth rates; hence, placing pressure on the countries pension system as well as its ability to acquire employees to fill the growing tourism and private sectors (Becker et al., 2017). The system of reforms, which identified the 200 occupations, however, was limited to exclude anyone with a university degree and focused on casa particulares (house rentals similar to Airbnb, restaurants, taxi drivers and hair salons). A missed opportunity was to allow support operations for the government, which would limit a potential 'brain-drain' of young Cubans entering the workforce as entrepreneurs rather than going to university and support-

ing businesses focused on computers, engineering and sciences, (Becker, 2012).

Reasons for the growth in the private sector is the ability to enhance incomes relative to state sector employment. Low wages, 777 Cuban pesos (\$32USD) and inflation have caused many workers to leave the public sector. In 2019, 31.8% of employees worked in the non-state sector, up from 4.9% in 2008 (Pérez, 2020), with employment in the state sector growing by 12,500, while the non-state (private) sector grew by 20,000, a trend that has been increasing and indicates that future growth will continue to come from this sector (Castro, 2020). The significant growth in small businesses, now licensing over 600,000 was accelerated by the Obama/Castro announcement to normalize relations in 2014, with an influx of tourists and family remittances to Cuba used to open businesses, transform rooms for Airbnb type accommodation (Casa particular) rentals and small cafes/restaurants.

The growth of small businesses were a vital aspect to accommodate the growth of tourism over the past 5 years, but with the current Trump administration embargo limiting tourism and the current pandemic due to the COVID shutdown, the private sector has been hit hard, and as many as 139,000 of the 600,000 small business licenses have been temporarily turned back into government enterprises (Rodríguez, 2020).

### iii) Currency Unification

Cuba has a dual currency system with the Cuban Peso (CUP) and Cuban Convertible Peso (CUC) which has an internal exchange rate of roughly 26:1 (CUP:CUC). Currency for foreigners can be exchanged at the bank or Casa de Cambios (CADECA), which offers a 24:1 ratio, and also changes a 10% currency exchange rate on U.S. dollars as a penalty, affecting many tourists (Cadeca, 2020).

For the past 15 years, the unification of the Cuban Peso (CUP) and Cuban Convertible Peso (CUC) has been discussed. Raul Castro re-affirmed the desire to unify the 2 currencies in a speech to the National Assembly in December 2017, with more attention being drawn to the possibility of unification in late 2020. Unification is needed to achieve sustainable long-term growth in the economy, but short-term, currency unification will affect inefficient state-run enterprises, as well as lead to higher inflation and impact the country's population, especially in the lower poverty levels and seniors on fixed incomes (pensions).

To address this, the government would need to implement unification in coordination with substantial wage reform, devaluation of the peso which will help exporters, enhancement of the non-state sectors, social welfare pro-

grams, and initiatives which target specific groups, rather than the current national systems such as the rations book which provides food items from which all citizens benefit.

The impact of currency unification and the subsequent impact on unemployment and inflationary pressure would further increase the prices of goods across the country, and ultimately would be reflected in further price increases in the tourism sector. This increase in cost and prices would resultingly impact Cuba's relative positioning in the Caribbean tourism market as an affordable tourism destination, relative to the Dominican Republic, the Bahamas and Cancun.

### Recommendations

Governments worldwide have taken several measures to safeguard their citizens and help to relieve the impact of COVID on businesses and industries. These have included financial stimulus packages and offering new lending and liquidity measures while adjusting borrowing terms on credit lines. For example, the government of Chile is offering \$150 million in additional loans to small businesses, guaranteeing 80% of the loans for up to 72 months, (Servicio Nacional de Turismo, 2020). The government can also offer relief to both businesses and citizens by providing income tax relief, reduction or elimination of business fees and support for social security measures to businesses. The Cuban system requires monthly tax remittances for small businesses, irrespective of the number of guests/customers and an onus to pay the pension of workers has been eliminated as the cuentapropistas have been given the opportunity to temporarily suspend their licenses. Other businesses have been forced to shut down by the government, with the exception of certain businesses considered essential such as food services, which provide take-out services. Small businesses have always struggled, with particular issues of cashflows needed for survival, and the current pandemic has aggravated this situation, as many of these businesses have been shut down, bringing in zero revenues. Those able to stay open need to change their methods of operations, such as curb-side pickups, internet operations and those with cashflows are using the time to upgrade or change operations.

During this time, there are many things the Cuban government can undertake in order to enhance operations and provide a coordinated effort to, not only open the Cuban tourism market safely, but to grow the market in the future. Following international guidelines from the WTO and WHO, Cuba will be able to open under restricted operations in hotels, casa particulares and restaurants. The fact that Cuba has a centralized government allows for benefits



during this time, like arranging medical staff in each hotel, and coordinating efforts to limit the number of hotels allowed to open, in turn, allowing for increased capacity utilization at those hotels, while other hotels remain closed to receive needed maintenance and upgrades.

Until the spread of COVID-19 has been flattened and reduced, many Governments will refuse visa applications and impose continuing travel bans on international travel. Given that Cuba has a centralized planned economy, this gives the government the opportunity, in combination with foreign owned firms, to upgrade facilities, shutting down hotels or sections of hotels for upgrades, and offering skills training, although this is limited in Cuba due to the lack of internet and computer capabilities; however, Cuba does have FORMATUR, the tourism school arm of MINTUR throughout the country which can offer limited enrolment and social distance education. Internationally, many governments have also offered income support incentives to retain staff, such as in Canada and the U.S. Although there will be pressure on the tourism industry in the short-term, Cuba, with its pricing structure, beaches, music, history, and culture will thrive and grow in the future.

In the near term, hotels, as has happened in many countries, have eliminated charges for cancelation due to COVID and many are modifying bookings to offer rescheduling vouchers to ensure tourists are still committed to coming to the destination. In some countries, such as Rwanda, this postponed travel offer has been extended to visitors for up to 2 years. (International Labour Organization, 2020).

Governments could also offer co-financing marketing campaigns with private industry to promote tourism in foreign countries (International Labour Organization, 2020). This is an opportune time for Cuba to undertake international studies of tourism research related to tourist wants and needs, and design new and expanded offerings to meet those needs. Tourists that are not able to travel still have a desire to consider future holiday travel. There is an opportunity to develop and utilize virtual tourism through the internet to showcase the rich history, culture and music of Cuba for potential visitors, as well as different offerings in sustainable tourism, medical tourism, and other unique offerings, giving potential tourists the chance to explore new regions while in lockdown at home.

Many countries have used this method to promote tourist attractions. This can be done in Cuba through the use of drone videos of landmarks, virgin beaches, coastal areas or concert footage of Cuban performances shown on websites, using social media accounts. Many countries are doing this to promote touristic areas such as Machu Picchu in Peru, the Eiffel Tower in Paris, and Angkor Wat

in Cambodia, as well as promoting shows such as “The Show Must Go On”, showcasing Andrew Lloyd Weber’s musicals, The Phantom of the Opera and Cats. Similar media performances of Cuban bands or Tropicana could be broadcast.

In light of the 30-year tourism plan of MINTUR, this is an opportunity to review and revise the plan. There are opportunities to expand sustainable tourism. Various guidelines exist for addressing and moving to sustainable tourism including the “EU Guidelines on Tourism and Transport in 2020 and beyond” to the “ILO guidelines on decent work and socially responsible tourism”. Cuba has developed extensive areas of sustainability and ecotourism, such as the Viñales and Las Terrazas, Isla de la Juventud, Zapata Peninsula Nature Park, the Antilles region, and Baracoa, where Columbus first landed in Cuba, but it can still use this opportunity to further its sustainability development in other regions.

Cuba also has an opportunity to expand offerings for medical tourism travel in order to lure potential tourism offerings to the country. The current response of Cuban doctors to the pandemic has them working in nearly 23 countries, helping garner new goodwill, respect and appreciation of Cuban doctors and nurses; this could be used as an opportunity to expand and mitigate the losses of income from the medical professionals working in countries such as Brazil, Ecuador and Bolivia. Cost for treatments range from 20% to 75% of the cost of treatments for elective surgeries versus the U.S. in Southeast Asia (Thailand, Malaysia). The market for international medical tourism ranges from \$65-87 Billion USD, and it is estimated that for every dollar spent, \$3 is spent on ancillary services such as food, transport, and accommodation (Kong, 2019).

Relatedly, Cuba has a very strong biotech sector in addition to the burgeoning medical tourism sector, which can be boosted considering the current favourable perception of the Cuban medical profession internationally. Cuba has been able to create unique remedies from cancer treatments to the alleviation of vitiligo. The Cuban government can take this time during the shutdown to develop a coordinated strategy to promote medical tourism.

Further options for tourism include hosting conferences, cruises, diving, cultural and fishing opportunities, along with development of golf course properties.

The cruise ships are a primary driver of tourism in many Caribbean countries such as the Bahamas, with over 5.4 million cruise visitors, and Cozumel with 4.5 million (Tourism Analytics, 2020). Cruise passengers spend on average \$222-\$300USD in each port destination, (acs-aec.org, 2020).

Diving and fishing tourism take on the natural surroundings of virtually untapped coastal waters; however, inland fishing has been heavily affected by the effort to increase fish farming of Tilapia, a very invasive species which has nearly decimated the largemouth bass populations, for which Cuba was previously considered one of the best fisheries in the world. Cuba still has a very strong fishing potential for the tourism industry with ample off-shore sports fishing, along with the history and allure of the annual Ernest Hemingway Marlin Tournament in May and the very limited bone fishing off Cienaga de Zapata, which is comparable to the best bone fishing in the Bahamas.

Cuba needs to coordinate operations between the public and private sector. A limiting factor now is the lack of coordination between the tourism state-controlled hotels and the private sector *casa particulares* which, in the past, the state has largely seen as a competitor. Coordination between the two will allow for the ability to manage the growth of the tourism industry to a greater extent. To do this, the *casa particulares* will need to coordinate themselves through a central association or cooperative, which will allow them to have a more coordinated voice when dealing with the state, as well as purchase in larger blocks, and allow for economies of scale in both operations, but also in marketing efforts.

To support the growth of tourism and reduce the need for imports, the government will need to invest in the agricultural sector and support the growth of non-state enterprises through cooperatives or self-employed farmers. The Cuban agricultural sector has been plagued by low productivity, low yields, and high bureaucratic controls in the past. The cooperatives and private farmers will need access to micro-financing to update equipment and technology and hire and train workers in order to increase skill levels, as well as greater autonomy in deciding what, to whom and how much output to produce. The government should also allow for more autonomy in state specific pricing guidelines for the agricultural sector. (Nova & González, 2015). Not only will this support the tourism industry, but also reduce the reliance on imports, which further affects Cuba's balance of payments discrepancy and the impacts of foreign currency issues.

In relation to the small business development in Cuba, which supports both the supply side through *casa particulares* and the demand side for domestic tourism needs with the growing middle class, the Cuban government could and should use this time to enact changes in the economic model. Cuba must improve their state enterprises by making them more efficient and look to strengthen the links between the state sector and the private sector.

The expansion of the private sector in 2010 was limited to 178 specific non-professional opportunities and was later slightly expanded to 200. The government needs to expand the types of business opportunities and include professionals in areas such as consulting, high tech, engineering, legal and accounting to help to accelerate the pace of private sector opportunities in order to reduce the 'brain-drain' of young Cubans to non-professional endeavours, but also increase the efficiencies of operations. By allowing private enterprises to support government operations through tender systems for projects and contracts, similar to the system used in Canada and the U.S., where private enterprises can bid on government contracts for specific projects and support work would allow governments to operate more leanly, and efficiently, while stimulating the economy, enhancing wage and incentive opportunities for the private sector and provide the money multiplier spin-off effects associated with the increased wealth of professionals to restaurants, domestic tourism and retail purchases.

An essential component of this for Cuba will be the need to specifically promote and enhance the role of female entrepreneurs and state sector workers in higher level positions which will help to negate the effects of migration in Cuba. Approximately 50% of women in Cuba have higher education degrees, however, they represent only 10% of senior management positions within enterprises in the country.

To further stimulate this sector, which can support the tourism sector as well, would require formalized and enhanced credit facilities for small businesses to allow for greater microloans. Currently, much of the private sector is funded from family remittances from foreign relatives, and although loans are available, this needs to be expanded.

The government should also reduce the restrictions related to the size of the businesses, allowing for scaling of operations, and the enhancement of efficiencies of operations. Reduction of taxation by the Ministry of Finance and Prices would also allow for more profits to be invested into scaling and enhancing operations, while stimulating the economy with more disposable income. The Cuban government can formulate this response more closely through the development of a Ministry of Small Business Development which would be able to allow businesses to thrive through coordinating financing, education (with *FORMATUR* and the various universities throughout the country), procurement, and relations with cooperatives and associations for small businesses, as well as liaise with other government ministries on tax and pension reform.

Foreign Direct Investment (FDI) is crucial for the expansion of Cuba's economy, not only in tourism, but also in other targeted areas. A major problem in attracting FDI to Cuba is the impact of the U.S. embargo and the Helm's Burton Act, penalizing enterprises doing business with Cuba. The pressure of the U.S. on the Cuban government, as we discussed in relation to the Cuban doctors working abroad, is largely based on the historic relation between Cuba and the U.S. going back to the 1895 Cuban war of independence against Spain and the Platt Agreement, establishing the Guantanamo Bay naval base and the right of the U.S. to intervene in Cuban affairs. This was furthered by the Agrarian Reform Act of 1960, when the embargo was established, following the Cuban revolution and finally the Cuban Democracy Act of 1992, preventing foreign based subsidiaries of U.S. companies from trading with Cuba (Becker, 2015).

A coordinated Foreign Direct Investment plan needs to be incentivized to enhance specific targeted areas of manufacturing (basic and light industry), biotechnology and agriculture, similar to the Vietnam model of targeted industry FDI. Cuba must expand FDI and take advantage of their educated workforce (97% literacy and free education to a PhD), to take advantage of opportunities for basic and light industry as well as the agriculture industry and enhance the utilization of the Mariel Special Development Zone, for national industries and exporters. Using a modified model of Las Terrazas, Cuba could look to allow enterprises exporting through Mariel Special Development Zone to keep a portion of the profits (foreign currency) for re-investment, efficiencies, wage increases and expansion, in conjunction with supporting small business enterprises.

## Conclusions

The global pandemic has created a situation that we have not seen before in business or industry in any country in the modern era. The result of the shutdowns has affected businesses, the stock markets, and our very way of life. Post-pandemic tourist destinations, including Cuba, will need to open cautiously and be prepared to reduce the possibility of infecting guests or having guests affect workers or the Cuban population. Cuba, already in a serious financial situation prior to the pandemic, with slow economic growth due to the U.S. embargo, will want to open their borders to tourists as quickly as possible, but this must be done safely.

Cuba benefits from a centralized planned economy from the communist government, in being able to have a planned, coordinated response to the pandemic, and to have the ability to shut down operations, hotels and use

this time to upgrade facilities and operations. Cuba has a 30-year plan developed by MINTUR, which incorporates a crisis and disaster rapid response analysis, but this will need to be re-evaluated in terms of their preparedness for global pandemics and other forms of crisis of disaster for learning initiatives.

Cuba has the FORMATUR tourism school that can offer upgrades of training to employees. To re-open safely, Cuba will have the ability to limit the numbers of hotels and locations operating in order to be able to gain economies of scale and provide a comprehensive marketing and messaging campaign to attract tourists focusing on the non-pharmaceutical indications to reassure the safety of travelling to Cuba.

To further prosper, beyond the pandemic, various recommendations for the government to initiate have been offered. These recommendations will help to further advance the economy, shift their business paradigm further towards an open market economy and enhance their economic positioning, including changes to the agricultural sector, enhancing the cuentapropista (private business) sector, taxation, enhancing education, training and financing to businesses as well as allowing for more autonomy in the different types of enterprises that can be used to reduce the potential 'brain-drain' and migration as well as enhance the quantity, efficiency and effectiveness of small business enterprises in the Cuban tourism sector.

Although this paper evaluated the impact of the pandemic in reaction to Cuba's response, many of the initiatives and discussion points here could be equally applicable to other tourism-centric countries in the Caribbean and around the world. Future analysis could expand the case study to do a comparative analysis with other Caribbean countries or other areas around the world, such as Southeast Asia, or look at the impact and reactions of communist versus capitalist country responses.

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