



WHAT U.S. TRAVELERS ARE DOING IN CUBA

Despite legislative restrictions, travel to Cuba by U.S. citizens is booming. Some 614,433 U.S. and Cuban American travelers visited the island in 2016; in 2017 that number could exceed 700,000. If Congress removed all constraints on the rights of U.S. citizens to freely travel to Cuba, the annual number of U.S. citizens traveling to the island is projected to reach jump to the millions.

The increase in Cuba travel is providing proven benefits to the U.S. economy: economic expansion and job creation in airline, cruise, lodging, telecom and travel services industries, amongst others. The presence of U.S. travelers and companies provides much-needed economic and cultural connections at a critical moment in Cuba. Moreover, the American people strongly support travel to Cuba, with polls showing that majorities of Americans and Cuban-Americans favor lifting all restrictions on their right to travel to Cuba.

Through a series of executive orders between 2009 and 2014, the U.S. government removed restrictions on Cuban American travel and liberalized purposeful travel for Americans of non-Cuban decent. A civil aviation agreement signed in early 2016 paved the way for the launch of direct commercial flights with American, Delta, JetBlue, Southwest and United, amongst others, all offering service. The first U.S. cruise ship arrived in Havana in May 2016 and dozens of voyages have occurred since. Airbnb launched its Cuba operations in April 2015 with roughly 1,000 properties. Inventory now exceeds 19,000 listings, making it the company's fastest growing market ever.

The influx of U.S. travelers comes within the context of reform in Cuba. Changes by the Cuban government have increased access to the internet, allowed Cubans to buy and sell homes, made it legal to start small and medium-sized businesses in some sectors and removed restrictions on Cubans' travel abroad. American companies and American travelers have been directly engaging with Cubans during this important moment of reform.

As the Trump Administration conducts its Cuba policy review, it presumably will analyze the effects of U.S. travel within the context of the stated policy objective to "engage and empower the Cuban people." U.S. travelers, according to a just completed professional evaluation, are clearly advancing that goal. Cuba Educational Travel, a leading travel service provider to Cuba, hired Public Opinion Strategies, a respected public opinion firm, to conduct a survey of recent American travelers to the island about their activities and experiences on the island.

Key Survey Findings

- U.S. travelers are supporting the Cuban private sector, eating at private restaurants (paladares), hiring private taxis, staying in private b&bs and homestays (casas particulares) and purchasing goods from private artists and artisans.
 - **76% of the travelers stayed in a privately-owned bed and breakfast for some or all of their time on the island.**
 - **99% of the travelers ate at a privately-owned restaurant (paladar).**
 - **86% of the travelers bought art, crafts, or music from an independent artist.**
 - **85% of the travelers hired a privately-owned taxi.**
 - **74% of the travelers engaged in discussions with Cuban entrepreneurs.**

Recent Cuba Traveler Survey – April 13, 2017



- U.S. travelers are economically supporting state workers, who rely on tips to survive, and offering generous support to Cuban individuals and humanitarian projects. Furthermore, they are talking to average Cubans about free market economics at a moment of economic reform.
 - **82% of the travelers tipped a bellman, maid, or other employee of a state-run hotel during their stay.**
 - **62% of the travelers spoke with Cubans about pricing, supply, sourcing, and other market elements.**
 - **49% of the travelers made a monetary or material donation to a community program and/or Cuban individual or family.**

- U.S. travelers are getting off the beaten track and having genuine conversations with Cubans about economic reform, technology and religious freedom.
 - **85% of travelers got into the home of a Cuban individual or family.**
 - **84% of travelers spoke with a Cuban about U.S. culture and American society.**
 - **70% of travelers spoke with a Cuban about internet and technology.**
 - **42% of travelers spoke with a Cuban about religion and/or religious freedom.**

- U.S. citizens that have actually traveled to Cuba, experiencing the island firsthand and interacting with Cubans of different walks of life, overwhelmingly believe travel to Cuba provides great benefits to the Cuban people.
 - **While just 14% of travelers believe U.S. travel and business with Cuba benefits the government more than the people.**
 - **86% of travelers believe U.S. travel and business with Cuba benefits the Cuban people more than the government.**

Conclusion

The survey results are clear. U.S. travelers are engaging directly with Cuban citizens, speaking to them about economics, internet, technology and other key issues at a critical moment of transition on the island. U.S. travelers are empowering Cuban entrepreneurs as important consumers of the products and services they offer in Cuba's growing private sector. The Trump Administration should maintain and expand upon the current policy regarding U.S. travel to Cuba.