What is CREST?

Mission: *Transforming the way the world travels*

- Originally connected with Stanford University; Today a global network of experts and academic affiliates
- Research, publications, field projects, conferences, films
- Provide analysis & tools to assist: Industry, Governments, NGOs, & International Development Agencies
- Sustainable Tourism Charter Club Trips: Cuba
- Focus in coastal & marine tourism and climate change

Global Trends in Coastal Tourism

Prepared by:
Martha Honey, Ph.D. and David Krantz, M.A.
*Center for Responsible Travel (CREST)*
A Nonprofit Research Organization
Stanford University and Washington, DC

Prepared for:
Marine Program
World Wildlife Fund
Washington, DC

December 2007
Demand for Sustainable or Responsible Travel

www.responsibletravel.org

Consumer demand
Sustainable business trends
Sustainable destinations
Growth of sustainable niche markets
Ecotourism

3 Legs

Conservation

Communities

Education

“Responsible travel to natural areas that conserves the environment & improves the welfare of local people.”

-- The International Ecotourism Society (TIES)
Sustainability principles should apply to all types of tourism activities, operations, establishments and projects, including conventional and alternative forms.” (UNWTO)
Sustainable Tourism

Environmental

Economic

Social
Lots of Sustainable Tourism Certification Programs
Eco-Certification: Measuring Sustainability

Destinations

Tour Operators

Hotels & Resorts

Golf Courses

Cruise Ships & Yachts

Airlines

Convention Centers

Parks

Marinas

Audubon Cooperative Sanctuary System

Green Destinations

GREEN Hotels

Eco-Certification: Measuring Sustainability

Cruise Ships & Yachts

Airlines

Convention Centers

Parks

Marinas
Eco-Certification: Measuring Sustainability

http://www.gstcouncil.org/en/
Where are we today?

- Nature-based Tourism
- Ecotourism
- Sustainable Tourism
- Urban Tourism
- Sun & Sea Resort & Cruise
The Caribbean (including Cuba): Sustainable Tourism Imperative

The Caribbean is the world’s most tourism dependent region.

2015: Pace of growth of Caribbean tourism outperformed every other major region in the world for 1st time ever. Tourism in Cuba increased 17% & US tourism “tsunami” begins.

Increasing numbers are ‘high value’ tourists who are seeking authenticity, environmental and social best practices, and more engagement with local people & the destinations they visit.

Caribbean tourism is especially vulnerable to climate change.

If not properly addressed, climate change impacts will devastate the Caribbean’s tourism economy and travelers will abandon it for other destinations.

Therefore sustainable tourism is no longer a choice, it’s a business/economic imperative.
Tourism Models

Urban

Cruise Ships

Yachts & ‘Pocket’ Cruises

Rural

Beach Resorts
Land-based, stay over tourists in the Caribbean spend **13 times more** than cruise passengers: $994 vs. $77.

--- Caribbean Tourism Organization (CTO)

Stay over visitors to Central America (Costa Rica, Honduras, and Belize) spend between **6 and 18 times more** than cruise passengers.

-- Center for Responsible Travel (CREST)

*Stay over tourism is far more beneficial to the local economy than cruise tourism.*
## Cruise vs. Stay Over Tourism: Jamaica

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>Expenditure</th>
<th>Daily Spending/Visitor</th>
<th>Average Length Stay</th>
<th>Total Spending per Visit per Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stayover</td>
<td>2,008,409</td>
<td>$2,011 million</td>
<td>$117</td>
<td>8.7 nights</td>
<td>$1,020</td>
</tr>
<tr>
<td>Cruise Passengers</td>
<td>1,265,268</td>
<td>$102 million</td>
<td>$76</td>
<td>1 day</td>
<td>$76</td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stayover</td>
<td>2,080,181</td>
<td>$2,130 million</td>
<td>$122</td>
<td>8.7 nights</td>
<td>$1,061</td>
</tr>
<tr>
<td>Cruise</td>
<td>1,423,797</td>
<td>$118 million</td>
<td>$82</td>
<td>1 day</td>
<td>$82</td>
</tr>
</tbody>
</table>

Source: Jamaica Tourist Board, 2014 & 2015
### Cruise vs. Stay Over Tourism: Grenada, 2015

#### VISITOR EXPENDITURE (US$)

<table>
<thead>
<tr>
<th></th>
<th>Arrivals</th>
<th>Total Expenditure</th>
<th>Total Value/Visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stayover</strong></td>
<td>140,735</td>
<td>$134 million</td>
<td>$950</td>
</tr>
<tr>
<td><strong>Cruise</strong></td>
<td>280,518</td>
<td>$11 million</td>
<td>$39</td>
</tr>
<tr>
<td><strong>Yachters</strong></td>
<td>22,115</td>
<td>$48 million*</td>
<td>$2182</td>
</tr>
</tbody>
</table>

Source: Grenada Tourism Authority, 2016
*2012 statistics from *Marine & Yachting Sector in Grenada*, 2013
Cruise ships could generate $88 million for Cuba in the 2016/17 season.
--John Kavulich, President of US-Cuba Trade and Economic Council
Lessons for Cuba: Costa Rica’s Ecotourism Model

- **Home grown & grew quickly**
  - 1987 – 1992
  - Country had right assets: healthy, well-educated population & good infrastructure (roads, electricity, clean water, etc)

- **Nature based: near parks or private reserves**
  - Spread throughout country

- **Locally owned: Costa Ricans or foreign residents**
  - Very little foreign investment

- **Responsive to market trends and grounded in sustainable practices.**
  - Remained remarkably strong
  - Leadership from both tourism ministry (ICT) and private sector.
  - CST: National certification program. One of earliest & strongest in world.
Financial Success of Costa Rica’s Ecotourism Model

In 2 decades:

• Arrivals increased 7 times
• Receipts increased 14 times
• Costa Rica doubled its earnings/tourist

By mid-1990s, ecotourism = top foreign exchange earner

Cruise tourism has remained minor sector.

Costa Rica’s Tourism Growth

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals (thousands)</td>
<td>261</td>
<td>435</td>
<td>792</td>
<td>1,088</td>
<td>1,980</td>
</tr>
<tr>
<td>Gross receipts (millions US$)</td>
<td>$133</td>
<td>$275</td>
<td>$718</td>
<td>$1,229</td>
<td>$1,895</td>
</tr>
</tbody>
</table>
2002: Delta Airlines began direct flights from U.S. to Liberia Airport

Guanacaste’s “Gold Coast”: ~100 coastal resorts served by Liberia airport.
## Costa Rica: Contrasting Profiles of Tourists

<table>
<thead>
<tr>
<th>Tourists</th>
<th>Liberia airport (resort tourism)</th>
<th>San Jose airport (ecotourism)</th>
</tr>
</thead>
<tbody>
<tr>
<td>From U.S.</td>
<td>80%</td>
<td>51%</td>
</tr>
<tr>
<td>Visit</td>
<td>North Pacific Coast (88%)</td>
<td>2 or more locations</td>
</tr>
<tr>
<td>Beach &amp; Sun</td>
<td>96%</td>
<td>57%</td>
</tr>
<tr>
<td>Visit national park</td>
<td>41%</td>
<td>53%</td>
</tr>
<tr>
<td>Length of stay</td>
<td>8.4 nights</td>
<td>12.4 nights</td>
</tr>
<tr>
<td>Spending</td>
<td>$1079</td>
<td>$1299</td>
</tr>
</tbody>
</table>

Based on Government Airport Surveys

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**Conclusion:**
Ecotourism/Nature/Rural Tourism = Higher value tourism
1. Healthy, well educated work force.


3. Strong government role in tourism planning, policies, investments, & operations.


5. Havana: Iconic; most culturally/historically rich city in the Caribbean.

6. Opportunity to create & capture the high value tourism market that is distinct from the Caribbean’s typical mass market, sun & sand tourism.
Suggestions for Cuba:

6 Key Steps to Sustainable, Competitive, High Value Tourism

1. Provide support, training & incentives to strengthen small-scale tourism businesses to meet international standards for quality & sustainability.

2. Require new tourism construction & renovations (in hotels, etc.) to become certified under internationally recognized programs.

3. Assess Old Havana under an international program such as destination criteria of Global Sustainable Tourism Council (GSTC).

4. Require all coastal resorts and other infrastructures meet ‘best practices’ in siting & design, construction & operations to address projected impacts of climate change.

5. Ensure that cruise tourism does not adversely impact Old Havana and remains a minor sector within Cuba’s overall tourism industry.

6. Regularly study each tourism sector to assess & measure economic, social & environmental impacts and benefits. Study experiences of other countries, especially in the region.
Thank you!

Martha Honey, Ph.D.
Executive Director

Address: 1225 I St. NW, Suite 600
Washington DC 20005
Tel: (202) 347-9203

Website: www.responsibletravel.org
Email: staff@responsibletravel.org