# COMPETING GLOBALLY THROUGH THE TOURISM INDUSTRY:

## A SAN DIEGO-BAJA CALIFORNIA PERSPECTIVE

## **Briefing Paper**

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Prepared by

Lawrence A. Herzog School of Public Administration and Urban Studies San Diego State University

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# Competing Globally Through the Tourism Industry: A San Diego-Baja California Perspective

Lawrence A. Herzog San Diego State University

#### INTRODUCTION

Tourism will become the largest sector of world trade early in this century<sup>1</sup>. Indeed, it is already regarded as the world's leading growth industry, with international tourism income increasing at the rate of nine percent over the last decade. Global tourism revenues were approximately seven hundred billion dollars in the year 2000.<sup>2</sup>

In Mexico, tourism is the third largest source of foreign revenue, after oil and manufacturing. Along the northern border, it rivals the maquiladora sector as the major source of foreign trade. The NAFTA has bolstered tourism by relaxing legal restrictions on investment and ownership, a trend that actually began in the late 1980's. Tourism is also a key component in the growth of the San Diego region. The visitor industry is the third largest economic force here, behind manufacturing and the military.

What is striking, however, in looking at the tourism economy of the San Diego-Baja California region, is the absence of a consolidated effort to integrate tourism development across the border. More than half of the tourists who visit the northern border of Mexico come from the border region on the U.S. side of the border. NAFTA will continue to promote cross-border integration, yet there is much work to be done in the area of tourism integration in this region.

In this briefing paper, I explore tourism development for the San Diego-Baja international border zone. This cross-border region of nearly 5 million people is a crucial "tourism metropolis" in the making-- an important project for Mexico-U.S. collaboration in the spirit of NAFTA. Clearly the regional forces at work here-- the explosion of demand for tourism services in Mexico, the high quality physical environment and climate, the proximity of an affluent, mega-market of consumers (in southern California), and the increasing globalization of the border region —collectively represent a huge opportunity for economic growth.

In the discussion below, I review some basic elements of the tourism economy of San Diego-Baja. I then outline important dimensions of tourism geography in the region—emphasizing both the separate dynamics of tourism and urban space on each side of the border, as well as the emerging shift toward cross-border tourism development.

<sup>&</sup>lt;sup>1</sup> See Colin Hunter, "Sustainable Tourism as an Adaptive Paradigm," *Annals of Tourism Research*, 24, 1997, 229-249.

<sup>&</sup>lt;sup>2</sup> World Trade Organization, 2000. Web site. www.world-trade.org

<sup>&</sup>lt;sup>3</sup> Lawrence A. Herzog, "Baja's Tourism Boom," *Hemisphere*, 1990, 2, 32-34.

<sup>&</sup>lt;sup>4</sup> Greater San Diego Chamber of Commerce. Overview of San Diego Economic Growth, 2000.

<sup>&</sup>lt;sup>5</sup> One study showed that in the late 1990's, some 75 million people, both foreigners and Mexicans, visited the northern Mexican border, with about 58% coming from the immediate border zone, and another 34% from border states. See Basilio Chavez, Nora Bringas and M. Basilia Valenzuela, *La Ciudad Compartida* (Tijuana: COLEF, 1995)..

The latter, I argue, is one key to attracting higher value added tourism activities. The other crucial strategy, I will offer, is to expand tourism development in what I term a "new tourism" strategy, which goes beyond the traditional idea of a visitor industry based mainly on large attractions and resort hotels. To achieve this "new tourism" strategy, I explore several key policy areas that will need attention as the region expands: planning for land development, promoting "cultural tourism," and preserving the environment, using an ecotourism approach.

## TOURISM AND ECONOMIC DEVELOPMENT IN THE SAN DIEGO-BAJA CALIFORNIA REGION

By the end of the 19th century, San Diego would build a new downtown along the waterfront, and begin the project of creating a modern urban economy. This included the creation of a tourism sector grounded in the local advantages of climate, physical beauty, connection to the transcontinental rail system, and the proximity to Mexico. At about the same time, northern Baja California, especially Tijuana, slowly discovered its attractions for tourists beginning with a hotel and warm water spa in the first two decades of the 20th century. In the 1920's, U.S. investors brought capital to Tijuana to build the infrastructure for an urban mecca of gambling, prostitution, cabarets, cantinas, wineries and other recreational outlets. The first installment of a major tourism center was completed. The image of 1920's Tijuana as a "sin city" became an advertising icon that continues to shape the marketing of the city and region today. <sup>6</sup>

In the 1920's, San Diego, too, was building an infrastructure for tourism. A growing contingent of San Diegans believed the city's destiny should be tied to its resort possibilities, its coastline and beach communities. After 1950, three of the most important tourist destinations on the west coast would locate in San Diego-- the San Diego Zoo/Balboa Park, Sea World/Mission Bay, and Old Town Historic Park. By the 1980's, tourism was adding a billion dollars to the regional economy each year, constituting 10% of the area's employment. Those numbers have continued to increase dramatically over the last 20 years. Meanwhile, expansion of coastal cities, particularly along the northern coast of San Diego county, has served to further bolster the tourism sector in the region.

Tijuana's post- 1950 boom was perhaps driven equally by tourism, along with the development of an international assembly plant industrial sector. From 1950-2000, the city grew from about 65,000 to 1.5 million inhabitants. Tourism development has been a constant and significant pillar of the city's economy. The Mexican government has fully supported this growth, as early as the 1960s, with the PRONAF (National Frontier Program) which sought to modernize and beautify border cities like Tijuana, as a way of promoting the tourism economy. Mega- infrastructure improvements from 1960 to 1990— the toll highway to Ensenada, the aqueduct at La Mision, the channelization and commercial development of the River Zone, and the widening of Revolution Ave.— assisted in Tijuana's transformation. The Mexican government was intent on capturing American consumers' spending in Mexico. By 1990, over 23 million tourists were

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<sup>&</sup>lt;sup>6</sup> See Lawrence Herzog, *From Aztec to High Tech*, Baltimore: Johns Hopkins University Press, 1999.

<sup>&</sup>lt;sup>7</sup> Herzog, 1990.

visiting Tijuana every year, <sup>8</sup> making it one of the most heavily visited tourist cities in the world.

Tourism development must be seen as part of the larger demographic and economic shifts occurring in the region. Tables 1, 2 and 3 offer a demographic overview of San Diego and Tijuana. In Table 1, it becomes clear that by the year 2000, the combined population of the region had grown to more than 4.5 million, and is projected to reach 5.5 million by 2010. Table 2 summarizes employment figures by economic sectors. Both the city of San Diego and the San Diego metropolitan region have relatively weak manufacturing sectors, but are quite strong in the area of trade and services. The tertiary economy continues to grow here, with tourism services and entertainment comprising a vital portion of that growth. In Tijuana, the tourism sector is equally or more important. Even with the increasingly dominant "maquiladora" (assembly manufacturing) sector, services in Tijuana continue to employ over 40% of all male workers, and over 50% of all female workers.

TABLE 1 POPULATION CHANGE, San Diego and Tijuana, 1970-2000

YEAR	City of San Diego	San Diego region	Tijuana region
1970	806,000	1,357,854	340,583
1980	939,100	1,715,100	747, 381
1990	1,043,800	2,498,016	1,346,000
2000	1,272,168	2,911,468	1,718,000

Sources: City of San Diego, Department of Economic Development, "Population, Housing and Employment Statistics," 2000; San Diego Association of Governments, 1990 Census Profile, 2000; Ayuntamiento de Tijuana, Plan Estrategico, 1995.

TABLE 2 EMPLOYMENT BY ECONOMIC SECTORS, SAN DIEGO

<b>Economic Sector</b>	City of San Diego (%)	San Diego region (%)
	1995	1990
agriculture	1.0	2.4
construction	3.0	7.8
manufacturing	12.0	13.8
trade (wholesale, retail)	19.0	22.0
finance, insurance, real	6.0	8.1
estate		
services	31.0	39.1
government	20.0	5.2
military	6.0	

<sup>&</sup>lt;sup>8</sup> Chavez, et al., 1995

<sup>&</sup>lt;sup>9</sup> It is likely that the figures for Tijuana are undercounted, as the census does not always count migrants living in unstable hillside or canyon locations.

other	2.0	1.6
total	100%	100%

Source: City of San Diego, 2000; SANDAG, 2000.

TABLE 3 TIJUANA, EMPLOYMENT BY SECTOR, 1987

SECTOR	% MALES EMPLOYED	% FEMALES EMPLOYED
manufacturing	21.3	5.9
assembly (maquila)	5.3	19.4
trade	26.5	24.6
services	43.2	41.5

Source: Jorge Carrillo, *Empleo y capacitacion en la industria maquiladora de exportacion*, Colegio de La Frontera Norte, 1993.

Recent statistics on the local/regional tourism economy make it clear that tourism continues to be a growth sector. Table 4 summarizes a variety of tourism indicators for San Diego. Both the number of annual visitors (14.6 million) and the amount of tourism spending (\$4.8 billion) confirm that the tourism sector is vital to the regional economy.

TABLE 4 TOURISM INDICATORS, SAN DIEGO 1999-2000

Category	Number	% Change '99-'00
Overnight visitors	14.6 million	+ 0.6
Visitor spending	\$ 4.8 billion	+ 4.2
Attraction attendance	19.5 million	+ 0.7
Airport, total passengers	15.3 "	+ 3.0
BORDER CROSSINGS	46.6 "	+ 4.0
aliens	38.1 "	+ 4.8
citizens	18.8 "	+ 4.0
Hotel/motel	72.2 %	- 1.8
avg. occupancy		
avg. room rate- daily	\$102.5	+ 3.9

Source: Greater San Diego Chamber of Commerce: Economic Indicators, San Diego, 2000.

San Diego's tourism expansion is part of a larger trend affecting the state of California. Table 5 summarizes the growth of visitor spending in the state. Between 1990 and 1998, total spending grew by 42.5%, and destination spending by 51.2%. Over an eight year period, that represents over 6% growth per year, slightly higher than the

change recorded in San Diego in 1999-2000, 4.2%. This implies that San Diego has room to grow, and, as I will suggest further on in this report, that growth will very likely be tied to attracting more global tourism through the Mexican connection.

TABLE 5
TRAVELER (TOURISM) SPENDING, STATE OF CALIFORNIA, 1990 AND 1998
(millions of dollars)

SPENDING CATEGORY	1990	1998	%change
TOTAL	45, 330	64, 760	42.5
Air transport	8, 400	9,000	
Travel arrangement	380	400	
DESTINATION			
SPENDING			
Total	36, 560	55, 310	51.2
Retail	8,700	15, 280	
Eating/drinking	6,500	9,430	
Lodging	6,090	9,240	
Recreation	4,340	7,210	
Ground transport	7,960	10,240	
Food stores	2,970	4,000	

Source: State of California, Trade and Commerce, 2000. Sacramento: Department of Finance, 2000.

Northern Baja California's three major coastal cities (Tijuana, Rosarito, Ensenada) received a combined 7.8 million visitors in 1998 (Table 6), slightly more than half the number that came to the San Diego region. No data is available on what percent of the visitors to Baja California cross the border into San Diego, nor on what proportion of San Diego visitors cross into northern Baja. However, clearly with over 20 million combined visitors to the region, more people might be induced into staying longer and visiting both sides of the boundary.

TABLE 6
TOURISM ARRIVALS: BAJA CALIFORNIA, MEXICO, 1998

CITY	NUMBER OF TOURISTS/YR.
Tijuana	6.2 million
Rosarito	1.0 "
Ensenada	0.6 "
Totals	7.8 "

Sources: SECTURE, Proyectos de Inversion Turistica en Baja California, 1998

As mentioned, tourism is the second fastest growing sector in Baja California (Table 7), with a 7.9% growth rate between 1993-98. However, there is still much room to grow. For example, Table 8's figures, although somewhat dated, offer an interesting point of comparison. In 1990, the number of foreigners (mainly Americans) entering Mexico at Tijuana increased to 23.6 million; we know that about 6 million tourist visitors entered Tijuana in the late 1990's, so let us assume the figure was 5 million in 1990. That means that only one fourth of all foreigners entering Tijuana are engaging in tourism activities. Surely that number can be expanded. Equally, huge numbers of Mexicans enter California at the Tijuana crossing (over 51 million in the late 1980's, more now, Table 9). Of this group, obviously many enter either to work, shop, or engage in a social visit. Yet many of these crossers are middle class families, who, given more promotion might engage in greater consumption of tourism activities north of the border. 10 Their consumption, as I will argue below, could be enhanced by greater attention to accessibility to tourism sites (location, infrastructure) and by diversifying tourism activities to attract not only mass tourism to large "attractions" (Sea World, etc.), but also a "new tourism" aimed at opening other forms of tourism in places enhanced by better environmental management and urban design.

TABLE 7
GROWTH RATES BY ECONOMIC SECTOR, BAJA CALIFORNIA, 1993-98

maquiladora (assembly)	18.0
tourism	7.9
construction	7.6
financial services	7.5
primary sector	4.1

Source: SECTURE, 1998

TABLE 8 FOREIGNERS ENTERING MEXICO, by place of entry 1985-1990 (in millions)

YEAR	Tijuana	Baja California	%Tijuana
1985	16.9	22.4	75.3
1986	19.0	24.6	77.0
1987	19.8	25.6	77.0
1988	23.8	31.0	76.9
1989	27.7	36.8	75.3
1990	23.6	33.4	70.6

Source: Chavez, et. al., 1995, p.49

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<sup>&</sup>lt;sup>10</sup> San Diego Convention Center & Visitors Bureau reports that of all overnight visitors to San Diego, 14.7 million in 1999-2000, only about 6% are foreigners. See ConVis web site at: www.sandiego.org/visitorprofile.idc

TABLE 9 BORDER CROSSERS ENTERING THE U.S., BY ENTRY LOCATION, 1988

LOCATION	NUMBER OF PEOPLE ENTERING
Baja California	71.8
Mexicali	18.8
Tijuana	51.7

Source: Chavez, et. al. 1995.

Not only is the Mexican market not being fully reached by tourism activities in the San Diego region, the U.S. Latino/Hispanic population has not been adequately tapped by northern Mexican tourism activities. Between seven and ten million people of Hispanic origin live in southern California. Yet, according to a survey of border crossers done by a major research center in northern Baja California (Table 10), in some counties large percentages of the Hispanic population tend to only visit Tijuana for a few hours. In fact, in the counties of San Diego, Orange and Los Angeles, in the late 1980's, a higher percentage of non-Hispanic visitors to Tijuana stayed overnight than did the Hispanic visitor population. We can extrapolate that in three of southern California's most densely populated counties, non-Hispanic visitors are spending more time and money in northern Baja California, then are Hispanic visitors. Again, my argument here is that this is both a problem of marketing, and a problem of creating a cultural environment in which Latino visitors feel motivated to cross the border into Mexico.

TABLE 10 LATINOS AND TOURISM IN TIJUANA: LENGTH OF TOURIST STAY (HOURS OR DAYS) IN TIJUANA BY ETHNIC GROUP. PLACE OF RESIDENCE 1988

PLACE OF RESIDENCE	HISPANIC/MEXICAN ORIGIN		NON-HISPANIC	
	% HOURS/	%DAYS	%HOURS	%DAYS
L.A. COUNTY	63.2	36.8	61.8	38.2
ORANGE	60.7	39.3	49.3	50.7
RIVERSIDE	40.0	60.0	77.8	22.2
SAN BERNARDINO	50.0	50.0	66.7	33.2
SAN DIEGO	90.6	9.4	83.9	16.1
VENTURA	53.9	46.1	75.0	25.0
REST OF CALIFORNIA	71.0	29.0	93.9	6.1
REST OF U.S.	54.5	45.5	96.5	3.5

Source: Chavez, et. al. 1995

<sup>&</sup>lt;sup>11</sup> Probably 5-7 million are of Mexican descent. The numbers are imprecise due to different estimates of the Mexican immigrant resident population, and to uncertainties over the number of illegal Latinos living in southern California.

<sup>&</sup>lt;sup>12</sup> Indeed, interviews with the creators of the tourist project "Mexitlan" in Tijuana revealed that they expected more Mexican Americans to visit their park than actually came.

## REGIONAL AND SUB-REGIONAL GEOGRAPHY OF TOURISM DEVELOPMENT

The location of tourism activities in the San Diego-Baja region is an important determinant of future tourism development and marketing strategies. The pattern of tourism location has two dimensions in this region: a) the existence of separate, distinct tourism enclaves on either side of the border; b) a more recent trend toward bi-national, cross border tourism, which I will argue should be one of the key future strategies to bolster the tourism economy.

#### a) Tourism development districts on either side of the border.

For at least the first half of the twentieth century, San Diego and Tijuana evolved as separate entities. While the cities fed off the existence of the border as an attraction to tourists, there was a tendency to develop the tourism market within distinct spaces on either side of the border. Tables 11 and 12 summarize the spatial dynamics of tourism development within each city.

San Diego built its tourism economy around 4 or 5 main activity zones: the downtown and waterfront area, Mission Bay/beach communities, Balboa Park/ Old Town, the international border, and more recently northern San Diego county. Clearly San Diego's tourism development strategy concentrated on locating primary infrastructure (hotels, entertainment activities, transit connections) in high visibility spaces based either on their physical attraction (the harbor, Mission Bay, coastal zones), or cultural and historical ones (Old Town, the international border, Balboa Park's architecturally significant buildings). These sites became strategic places to locate high profile tourism attractions such as Sea World (Mission Bay), the San Diego Zoo (Balboa Park), or the Gaslamp Quarter historic district (downtown).

Further, as San Diego grew in the post 1970 era, new facilities have clustered within the same districts—for example, Seaport Village, the Convention Center and Horton Plaza were clustered in the downtown district and along the waterfront. After much debate and haggling, the new baseball facility will also locate near the waterfront in downtown San Diego. Meanwhile, a great deal of supporting infrastructure has tended to concentrate around these tourism spaces: new trolley lines, freeway improvements, mass transit improvements, redevelopment programs, facility expansions, new hotels, restaurants, and shopping facilities. For example, in addition to the Gaslamp Quarter, downtown San Diego can boast a number of other emerging district renovation projects, including Little Italy, the Columbia district, the Marina district, the Santa Fe Railroad Station, and the East Village. As San Diego's population grew after 1960, the city physically dispersed toward the east and north. Northern San Diego has become the biggest growth zone in the city, with nearly a million residents. As a result, it has also emerged as a new location for tourism facilities, such as the Del Mar Racetrack, Legoland, and Wild Animal Park.

Tijuana's tourism development (Table 12) has been more spatially concentrated than in San Diego, and this in part reflects the overall higher density and more condensed physical form of Tijuana. Four districts dominate: downtown, the River Zone, La Mesa and the Playas-Rosarito-Ensenada coastal corridor zone. Downtown Tijuana is far and away the dominant tourism district of the city. It is within walking distance (less than 1 mile) of the border crossing at San Ysidro, and thus counts heavily on pedestrian traffic of millions of annual foreign visitors. Like most Mexican border towns, the traditional downtown district has always been "other directed"-- a place designed for outsiders, with a linear commercial strip (Revolution Ave ) where bars, cabarets, donkey carts, banners, and outrageous architecture create a kind of Disneyland of celebration and surreal fun for tourists). 13 Unlike San Diego, however, Tijuana's downtown has not experienced significant redevelopment. The Mexican government recognizes this is a crucial next step, and there are emerging redevelopment discussions for downtown and its surrounding districts, including a new pedestrian bridge crossing, new commercial developments, and a modern traffic circulation plan. To date, the main accomplishments in and around downtown have been the remodelling of Revolution Ave. (early 1980's), and the construction of Mexitlan, a theme park of miniature scale models of Mexican architecture, with food and entertainment. Mexitlan has not been the successful venture its investors hoped for; its failure merits a separate study that would be valuable to the tourism industry.

Rather than concentrate on downtown, the Mexican government, and private investors have looked southeast and toward the coast. In the River Zone of Tijuana, the city imagines its future, sprawling across the channelized river bed. Here, tens of millions of dollars have been spent in building an impressive corridor of high rise office buildings, hotels, restaurants, entertainment centers, and cultural activities. The Cultural Center of Tijuana (CECUT) is one of the high profile tourism sites here. So are a series of post-modern shopping centers like Pueblo Amigo, and Plaza Fiesta, as well as the large Rio Tijuana mall. The coast has also been a major tourism location, particularly along the Tijuana-Rosarito axis, in which one finds the new bull ring, Fox Titanic Film Studio, the New Port (Puerto Nuevo) lobster village, and a string of resorts, golf clubs, and other tourism attractions. Generally, one can say that Tijuana's tourism development has been far more modest than San Diego's; here is an enormous window of opportunity for investors, and as I mention below, many new coastal projects are waiting in the wings.

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<sup>&</sup>lt;sup>13</sup> Two useful discussions of this are Lawrence Herzog, *From Aztec to High Tech: Architecture and Landscape Across the Mexico-U.S. Border* (Johns Hopkins University Press, 1999), and Daniel Arreola and James Curtis, *The Mexican Border Cities* (Tucson: University of Arizona Press, 1993).

TABLE 11
TOURISM ACTIVITY ZONES: SAN DIEGO

TOURISM DISTRICTS	SUPPORTING INFRASTRUCTURE
Downtown San Diego/harbor	Embarcadero waterfront development
	B Street Pier
	Seaport Village
	Convention Center/ Expansion
	Gaslamp Quarter
	Marina district
	Little Italy
	light rail/trolley
	Horton Plaza
	East Village/Ballpark district (proposed)
Mission Bay/beach communities	Mission Bay construction
	hotel developments
	La Jolla village
	Coronado Bay bridge
	Hotel del Coronado
	Pt Loma lighthouse/state park
Balboa Park/Old Town	zoo, museums, international cottages
	renovation of El Prado
	Highway 163
	Old Town Historic Park
	mass transit linkages (proposed)
Northern San Diego county	freeway linkages
	Wild Animal Park
	Legoland
	Del Mar Racetrack
	Amtrak Station (Solana Beach)
International border connnections	San Ysidro trolley
	Intermodal Transit
	International Gateway of the Americas

# TABLE 12 TOURISM ACTIVITY ZONES: TIJUANA/northern Baja

TOURISM DISTRICTS	SUPPORTING INFRASTRUCTURE	
downtown	remodelling of Revolution Ave	
	traffic circulation plan	
	Mexitlan construction	
	commercial redevelopment (proposed)	
	pedestrian bridge at El Chaparral (proposed)	
River Zone	Roads/freeways	
	Plaza Rio Tijuana shopping mall	
	Cultural Center of Tijuana	
	Museum of the Californias	
	Pueblo Amigo	
	hotels, restaurants	
La Mesa	Caliente Race Track	
	bullring	
Coast/Rosarito/Ensenada	Playas de Tijuana bullring	
	Fox StudiosTitanic film tour	
	Rosarito hotels, restaurants	
	coastal toll highway	
	La Mision aqueduct	
	Puerto Nuevo lobster village	
	assorted resort communities	

#### b) Bi-national, cross border tourism

The emergence of San Diego-Tijuana/northern Baja as a globalizing, transfrontier metropolis signals in many ways a new era in the tourism development of the region. Economists have long known that the tourism industry benefits from increases on either side of the border, since each side always gets a certain amount of residual spending from its neighbor. In the past, trade obstacles, the perception of the boundary as a barrier, as well as cultural misunderstandings limited the cross-border synergy in tourism development.

With NAFTA and economic integration that is no longer the case. The cross-border opportunities for tourism promoters are enormous. Investors see the northern Baja California coast as a gold mine of pristine beaches and low real estate prices, combined with the exotic locale of Mexico. Southern Californians see northern Baja California as an extension of their "urban field," the spatial limits of their recreation travel on weekends and holidays. The market for development in the San DiegoTijuana region is robust.

Both local governments now recognize also that they need to develop a cross-border infrastructure to support bi-national tourism development. Table 13 summarizes some of the major projects on line to integrate the two cities and create a transnational tourism experience. In a sense these next 10-20 years involve the building of better ports of entry, airports, mass transit and roads to allow visitors to move efficiently between tourism spaces on either side of the border

Further, there are serious efforts being made to renovate and improve the physical land ports themselves, and to add a new land port at Virginia Ave., west of the San Ysidro border gate. The border gates themselves hold promise as centers of urban growth in the future. Leconomic development has not occurred to date around these gates, but in the post-NAFTA era, new projects like the International Gateway development can be expected to enhance these facilities. This would be part of a "new tourism" strategy that seeks to develop spaces (other than the large scale attractions like Sea World, Legoland, etc.,) for other types of visitors. A high density urban tourism space at the boundary could be a staging area for border cultural tourism.

Obviously travel by car and mass transit between San Diego and Tijuana must be improved to facilitate the cross-border tourism project. Efforts are being made on the U. S. and Mexican sides of the border to create a freeway system that efficiently connects the two cities. Further, improvements of the border gates will allow autos to move more quickly across the border. This continues to be one of the key obstacles to the cross-border tourism project. Finally, tourism depends on maintaining a clean, sustainable physical environment. The U. S. and Mexico are depending on two NAFTA entities-- the BECC (Border Environmental Cooperation Commission) and the NadBank (National Development Bank)-- to finance a number of key environmental infrastructure projects which will have the side effect of aiding the trans-border tourism economy.

<sup>&</sup>lt;sup>14</sup> See Lawrence A. Herzog, "Urban Development Alternatives for the San Diego-Tijuana Port of Entry/Border Zone. *Briefing Paper*. San Diego Dialogue. 2000.

<sup>&</sup>lt;sup>15</sup> The International Gateway project is a mixed use development project that envisions shopping, office and entertainment adjacent to a new border crossing and pedestrian bridge near Virginia Ave.

### TABLE 13 CROSS-BORDER INFRASTRUCTURE PROJECTS: SAN DIEGO-TIJUANA

(Planned, in progress or completed)

CATEGORY	PROJECT	LEAD A CTOR (S)
Airports	Twin ports/airport	City of San Diego \$1-2 billion
-	Lindbergh Field airport	Unified Port District, \$23 8 million
	upgrade, San Diego	, in the second of the second
	Rodriguez airport expansion,	private venture
	Tijuana	
	Brown Field airport (Otay	private investment, \$1 billion (proposed,
	Mesa, San Diego)	not approved)
Land Port of	Port of entryOtay Mesa	County of S.D.
Entry		
	Virginia Ave. crossing	City of San Diego, GSA
	International Ave : circulation	Mun. of Tijuana
	plan for border crossing	
Rail	Rail linkage, Tijuana-	private, \$160 million
	Ensenada	
	Tijuana Light Rail transit	Mun of Tijuana
	San Ysidro Intermodal	MTDB, \$12.6 million
	Transport Facility	
Highway	Freeway Rt 905	Calif Dept of Transportation
		(CALTRANS) \$174 million
	Freeway Rt. 125	CALTRANS \$400 million
	Widening Otay Mesa Rd,	City of S.D
	Tijuana 2000, peripheral hwy	SAHOPE, \$100 million
	ring to Ensenada	
	Road improvements	Mun of Tijuana
Water ports	Port of Ensenada upgrade	State, federal govt \$106 million
	Ensenada cross border cruise	City of Ensenada, \$21 million (phase I
	ship expansion	of 3 phases)
Land use	upgrade San Ysidro Port of	City of San Diego
	Entry	
	International Gateway, mixed	Land Grant Development (private) W
	use development	City of S.D \$200 million
	Tijuana redevelopment at El	Mun. of Tijuana
	Chaparral order crossing	
Environment	Wastewater treatment plant	National Development Bank (NADB)/
		BECC
	Ecopark expansion	NADB
	Southbay border wastewater	City of S.D.
	treatment plant, S D.	
	Border Power Plant	Pacific Gas & Electric (private)

## CREATING A GLOBAL TOURISM DEVELOPMENT STRATEGY: UNDERSTANDING THE ACTORS

In order to make effective planning decisions about future global tourism strategies in San Diego-Baja California, it will be important to identify who the key actors in this industry are, and what their role in tourism development might be. These actors include:

#### 1) Global tourism operators

Tourism is one of many late twentieth century industries increasingly controlled by large, multinational corporations. Global tourist enterprises include: transportation companies (like airlines), travel agencies, advertising firms, and investment groups—many of these firms are located outside the region. They tend to emphasize marketing packages to large volumes of consumers, This marketing is done in home headquarters in global cities (New York, Chicago, London, etc.) far away from the regions where the travel actually occurs.

#### 2) Global investors/developers

Corporations tend to want to homogenize products and consumer behavior; this enhances the degree to which they can control this behavior through global advertising. When this homogenization is transferred from consumer products to *consumer places*, as happens in the case of tourism, the effect could be to destroy or alter two key elements of San Diego/Baja 's regional landscape; a) historic sites that add to "cultural tourism;" b) pristine natural settings like beaches, canyons, and coastal marshes.

#### 3) Host populations

Host populations want to maintain their regional quality of life, while gaining economic benefits from environmentally friendly development.

#### 4) Community action coalitions/ NGO's

When residential communities feel sufficiently threatened by the actions of private investors or global resort developers, they occasionally form political action coalitions, often to protest a specific project.<sup>17</sup> In San Diego/Baja this process has led to

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<sup>&</sup>lt;sup>16</sup> An example would be the recent attempt by a developer in Ensenada to dismantle the historic Santo Tomas winery near downtown. This neo-colonial turn of the century site is one of the key elements in Ensenada's attraction for cultural tourism.

<sup>&</sup>lt;sup>17</sup> For example, residents along the northern Baja coast, have tended to organize around local environmental conflicts, such as the proposed construction of a waste incineration plant in Playas de Tijuana (this proposal was defeated by a local activist group), the sewage spillages along the coast near the treatment plant at Punta Bandera, to the south of Tijuana, the pollution created at Popotla by the Fox Studios, and the proposed expansion of a resort near Estero Beach, Ensenada.

the creation of transfrontier political organizations, with the presence of environmentalist groups and NGO's north of the U. S -Mexican border (including the Audobon Society, Sierra Club, and Natural History Museum). <sup>18</sup>

#### 5) Governments/public policy-makers

In Mexico, no single government entity handles tourism development and planning. Obviously the state and national Secretary of Tourism (SECTUR) is the key promotional agency in tourism growth, and the municipalities and state environmental planning offices try to accommodate growth plans. Also, in Mexico, there is a national tourism promotion group called AMTAVE that represents tourism businesses. At present, little coordination and collaboration exists between different levels of government on the subject of coastal development. Also, local governments often do not provide the services for tourism projects; instead private companies do. This can lead to a lack of regulatory control over land use and environmental management. <sup>19</sup>

On the U S. side of the border, tourism developments are handled by the same planning processes that deal with other large development-- environmental impact review (EIR), local planning and zoning reviews, state and federal environmental laws for specific ecological impacts (flood plains, watersheds, coastal waters, etc). The San Diego region suffers the same problems as Tijuana: there is no regional entity that reviews the overall impacts of tourism development. The promotion agency, San Diego Convention and Visitors Bureau does oversee some local issues. But specific projects are reviewed on a case by case basis. Further, there is no agency that deals with the problems and issues of cross-border tourism.

6) Large tourism attractions. Some of the large, privately (or quasi-private) owned, visitor attractions exert an important influence on tourism decision-making in the region. They include: Seaworld, Legoland, the San Diego Zoo, Wild Animal Park, Mexitlan, Caliente Racetrack, and Fox Studios Baja.

<sup>&</sup>lt;sup>18</sup> Two examples of U.S. -influenced NGO's in northern Baja include *Las Gaviotas* and *Pro-esteros. Las Gaviotas* was formed in the early 1990's to combat development near the Playas de Tijuana area on lands that had originally been developed for open space. *Pro-esteros* was created with the help of U.S. environmentalists in 1988 to protest the development of a petroleum production platform near an estuary in Ensenada, and later, to oppose the expansion of a resort on another estuary near Ensenada.

<sup>&</sup>lt;sup>19</sup> See Nora Bringas, "Turismo, Municipio y Desarrollo Regional en la Frontera Norte~ El Caso del Corredor Turistico Tijuana-Ensenada," in T. Guillen Lopez and G. M. Ordonez Barba, eds El *Municipio y el Desarrollo Social de La Frontera Norte*. Tijuana: COLEF, 1996.

#### THREE STRATEGIES FOR MAKING THE REGION'S VISITOR INDUSTRY MORE GLOBALLY COMPETITIVE

San Diego-Baja California can enhance its competitiveness in the tourism industry by better utilizing its regional advantages—of border culture, coastal, mountain and desert ecology. To do this, it needs to expand its approach to tourism development in the form of adding "new tourism" strategies built around cultural sites, ecological sites, and neighborhoods whose assets are enhanced by good urban design. To achieve these goals, there are at least three major challenges to diversifying the tourism industry, and planning for its growth:

#### 1) MANAGING GLOBAL LAND DEVELOPMENT

In a high density urban region, like San Diego-northern Baja California, one of the important challenges is to control tourism and resort development areas, so that they do not compromise the very amenities that create the demand for tourism. As mentioned above, this region's competitive edge over other North American areas is its natural setting, and its cultural heritage/Mexican border theme. Large- scale land development must therefore be carefully balanced against these considerations.

The example of the development of resorts and tourism activities along the northern Baja California coast may be useful as a case study. A number of large scale mega-resorts are planned for the Baja coast (see Table 14). They include the Real Del Mar project (partially completed) which plans to build out at 4000 homes and 2000 hotel rooms; Baja Studios film production complex owned by 20th century Fox billionaire Rupert Murdoch. Baja Studios is planning to expand, and may build a theme park too; the 40 million dollar marina/pier complex at Rosarito; 4 big projects in Ensenada, including the 11 million dollar commercial/residential development at Punta Piedra, a 30 million dollar aquatic theme country club/residential resort at Puerto Salinas, and an 80 million dollar mega resort/hotel golf country club at Bajamar; as well as the partially completed Ensenada Cruiseport Village which will provide some 200 berths for private boats, docks, and commercial development around the port-- with over \$40 million already invested. Further south two mega-projects in the planning stages include rebuilding a natural estuary south of Ensenada at Punta Banda, and building a massive resort with 5 luxury hotels, 3 golf courses, a 350 slip marina on 2200 acres at San Quintin Both projects have been opposed by local Baja environmentalists and U.S. NGO's who claim the projects will substantially destroy local marine resources, such as coastal sage, scrub, coastal sand dune flora, migratory bird sanctuaries, lagoons, bays, estuaries, and local marine animals such as Pacific mackerel, sardines, sea bass, and pismo clams.<sup>20</sup>

<sup>&</sup>lt;sup>20</sup> See Kraft, Clayton, 1998. "Environmental Impacts of Coastal Tourism in Baja California Norte: New Tourism Development in San Quintin," unpublished manuscript.

## TABLE 14: RECENT/ PLANNED HOTEL/RESORT MEGA PROJECTS: NORTHERN BAJA CALIFORNIA COAST

#### 1. Rosarito

Real Del Mar: 1993. luxury homes, Marriott hotel (2,000 rooms) country club, 4,000 homes, \$50-100 million (estimated), Grupo Frisa.

Hotel Villas de Corona, 1987. 344 rooms. \$28 million.

Baja Studios. 1996. film production complex, giant pool, workshops, offices, heliport. \$20 million. Fox Corp., Los Angeles.

AA4/PM. 1997. Gas station, Mini market, pharmacy, tourist kiosk. \$2 million. Arco Corp./AM-PM.

Marina/pier expansion, Rosarito Beach Hotel. 1999. Construction of pier, boat slips, commercial development. \$40 million. Ex-mayor of Rosarito, U.S. and Mexican partners.

#### 2. Ensenada

Villa Punta Piedra 1996. Commercial development, 5 star hotel, 431 luxury homes, \$11.5 million. U.S. company.

Puerto Salinas Lake/1\4arina. 1998. Artificial marina, luxury homes (300), aquatic/sports complex, \$30 million. U.S./ Mex. investors.

Bajamar Mega Resort. 1992. Country club, resort, 2 golf courses, school, offices, condos, luxury homes, hotel. \$82 million. Grupo Sidek (on hold).

Ensensada Cruiseport Village. 1998. Waterfront development in port of Ensenada. 3 new piers; 188 luxury boat slips, shopping center. \$40 million.

Source: SECTURE, Proyectos de Inversion Turistica en Baja California, 1998

Baja California's coast already suffers from number of environmental conflicts, including those generated by fishing industries of Ensenada, and the Rosarito power plant. New growth could generate unsustainable spaces where garbage is dumped, cliffs along beaches erode and high rise developments block visual access to the ocean. Some control must exerted over the collective outcome of all of these projects.

#### 2. DEVELOPING CULTURAL TOURISM

"Cultural tourism" refers to historic or culturally significant sites that attract tourism. Examples in San Diego-Baja include Old Town, the Gaslamp Quarter in downtown San Diego, the waterfront, and Revolution Ave. in downtown Tijuana. A number of cities in other parts of the world have discovered that there are alternatives to "mass tourism" (predictable tourists who visit famous attractions); these alternatives exist in a form of cultural tourism which creates well designed neighborhoods that attract a variety of visitor types: conventioneers, business-persons, and other travelers. One example is the city of Barcelona, where a strategy of good urban design combined with the 1992 Summer Olympics has fashioned a new image, and attracted waves of "new tourism" to the region.<sup>21</sup>

In order to successfully implement a cultural tourism strategy, it may be helpful to point out some examples of troublesome developments, where the marketability of a neighborhood or cultural site is compromised by poorly planned development.

#### a) Puerto Nuevo

The town of Puerto Nuevo, south of Tijuana, was born as a village of restaurants run by lobster fishermen and their families in the 1960's and 1970's. It's attraction was as a simple place to eat lobsters at low prices in a non-luxurious, family style setting. But, Puerto Nuevo may become a victim of its own success. High demand in the 1980's and 1990's has caused an absolute boom in the number of establishments and the scale of construction. Two decades ago, there were 10-15 restaurants, all modest in size, all one story. Today, there are 30 or more establishments, and many are building up to three and four stories. More importantly, worker housing is spreading to the edges of the cluster; much of it was built spontaneously, without services or any land regulation. The result is that the growth of the town is precarious, and features serious environmental problems: garbage disposal in canyons, cliffside erosion, lack of planning. Meanwhile, at the edges of Puerto Nuevo, its success has attracted more resort development and new housing, which creeps up hillsides and edges toward the coast.

Puerto Nuevo's popularity has been enhanced by the nearby location of the film production Fox Baja Studio where the film "Titanic" was produced. So many visitors came south to view this site, that nearby Puerto Nuevo has converted itself into the marketplace destination for the new Hollywood presence in Baja California. Signs now point to its declaring itself the "home of the Titanic" (*Villa Titanic*).

<sup>&</sup>lt;sup>21</sup> See Lawrence Herzog, "Barcelona, Spain: Economic and Urban/Regional Revitalization in the Post-1976 Period," *Forum Fronterizo Paper*, San Diego Dialogue, 2000.

#### b) Puerto Popotla

The village of Puerto Popotla, some 3 miles south of Rosarito, began as a small fishing village of less than 100 residents. The Hollywood film company Twentieth Century Fox leased land adjacent to the village to build a major studio for film production in the mid 1990's. The film happened to be the "Titanic;" it's enormous global success has had ripple effects on this zone of Baja California. <sup>22</sup>

The development of the Fox Studios into a theme park celebrating the epic film "Titanic" has been juxtaposed against the existence of the small fishing village. Residents of the village claim that the government failed to consult them about the impending construction of the film studios, which are so close as to dwarf the town with their massive, metal warehouses, and a giant concrete wall surrounding the site which townspeople have dubbed "the Berlin wall." Because security around the site is extremely tight; its high walls and guardhouse pose visual barriers to local residents. Residents have also complained about destruction of of marine life for kilometers around the site during filming periods.

Yet these events have ultimately created more global interest in the site. An international arts festival on the border, Insite '97, agreed to sponsor a community mural program, and used the production of murals along the Titanic concrete wall to enhance community identity and to give residents control over their built environment. If well maintained, this art exhibit could be part of the "new tourism" experience in visiting this site. However, it will be important for Fox Studios to work with the community in making this a sustainable visitor zone.

#### 3). PROMOTING ECOTOURISM AND THE ENVIRONMENT

It's critical to note that tourism development has the potential to be symbiotic with the physical environment in several ways: i) travel can actually promote environmental awareness; ii) ecotourism policies can be put in place to make the tourism experience environmentally friendly; and iii) in many cases, successful tourism *requires* a high quality environment, since the very things that attract visitors-oceans, beaches, mountains, etc.-- are part of the natural ecology of tourism regions.<sup>23</sup>

Ecotourism is a new concept that emphasizes creating tourism activities that: a) do not degrade local natural resources; b) educate visitors about local ecology and culture; c) create economic benefits that are retained locally; d) promote conservation of

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<sup>&</sup>lt;sup>22</sup> At least three other Hollywood films used the Fox Baja studios since the "Titanic" production.

<sup>&</sup>lt;sup>23</sup> See Cater, Erlet. 1994. "Tools for Sustainable Tourism." *Geographical Journal* 160: 114-115.

wildlife and habitat, as well as preservation of historic and cultural sites.<sup>24</sup> Ecotourism-oriented development has many success stories around the world. These include: Australia, where ecotourism projects bring in \$250 million/year in additional revenue; Costa Rica, where one fourth of national land has been put aside in national parks and biological reserves, and, as a result, new tourism is arriving to experience these wilderness settings. Costa Rica earned \$700 million from tourism in the 1996. Hawaii is another place where ecotourism is taking off; it has been called the state's fastest growing sub-sector, accounting for one billion dollars out of the annual ten billion earned in the state from tourism.

Both northern Baja California and San Diego have resources that will benefit from the ecotourism approach, and could attract additional tourism to the region. Baja's coastline is still an attraction for southern California, and there are already whale watching, kayaking, bicycling and other activities. However, as the coastline is urbanized, more thought needs to be put into planning to preserve and protect natural settings for ecotourism. San Diego is, of course, known for its physical beauty—but much of its tourism falls in the category of beach vacations, golf and large resort hotels. Much of San Diego's natural beauty is not enjoyed by typical tourists—this would include whale watching, kayaking coastal waters, bird watching, hiking on coastal and mountain trails, or in Anza Borrego desert park. With some planning and promotional coordination tourist packages could include visits to these important sites. Furthermore, hotels and other mass tourism players would realize the importance of these activities, and be motivated to support environmental management of endangered sites.

## SAN DIEGO-BAJA CALIFORNIA TOURISM DEVELOPMENT POLICY RECOMMENDATIONS

- 1) The San Diego-Baja region needs to create a **regional tourism development policy** that is supported by a network of tourism agencies, from ConVis to the Chamber of Commerce, the cities, SECTUR in Tijuana, SANDAG, Implan in Tijuana, and others. It might be useful to house an umbrella agency within a joint SANDAG-IMPlan tourism planning initiative.
- 2) The tourism development policy should redefine and expand tourism promotion to include not only mass tourism to major attractions and resort hotels, but also "new tourism" markets not yet previously targeted. These may include business travelers, convention attendees, ecotourists and adventure travellers, writers, artists, and others.
- 3) "New tourism" approaches should include emphasis on **cultural tourism**, **ecotourism**, **and better planning and mangement of large scale urban growth**. A "New tourism" planning document should be generated, in which specific locations and design/management and infrastructure policies are outlined, and a timetable is generated for creating more diverse options for visitors to the region. All of the major players in the visitor industry should be included in this process.
- 4) Tourism growth must also better focus on the ways of expanding the San Diego-Mexico **cross border connection**. Emphasis should be made in improving transit

<sup>&</sup>lt;sup>24</sup>An excellent study is A. Scott, B. Shih, and B. Goldberg, "Ecotourism in the San Diego-Baja California Region," San Diego Dialogue, UCSD, 1998.

- access across the border, as well as signage to help orient tourists. Also cross-border tourism promotion must be expanded. For example, currently, on the Con Vis web site, under "Facts about San Diego", there is almost no mention of Tijuana and Baja California (except under shopping). Neither Tijuana nor Baja's coast is mentioned under the list of "attractions," nor under the list of "cultural activities". This kind of informational error needs to be corrected.
- 5) Further, the "image" of the international border needs to be improved on two levels: first, the physical condition of the border zone must be upgraded, to overcome the perception of it as an unsafe "war zone" of drug dealers and immigrant smugglers. An urban design plan is needed for places like San Ysidro. Second, negative reporting in the media needs to be offset by stories of culture and ecotourism from the region.
- 6) Tourism promotion and planning agencies should make better use of **regional university potential in studying tourism development and marketing**. On the U.S. side of the border, UCSD, San Diego State, Cal State San Marcos and USD all have departments that work on tourism development and related issues. These include faculty and researchers in the fields of environmental sciences, urban planning, geography, recreation and tourism, biology, environmental health, and ecology. Also, there are at least two local architecture schools that could assist in design studies. On the Mexican side of the border, there is a major research center (COLEF) that could support such work, as well as a number state and private universities.
- 7) Tourism planning and promotion would benefit from taking a closer look at success stories in urban tourism (Barcelona, Spain, for example) as well as success stories in ecotourism (the city of Seattle is a good local example).
- 8) Organizations like ConVis and the Greater San Diego Chamber of Commerce might consider staging a **coalition-building "New tourism program**" which would bring the public and private sectors together to think about future tourism in the San Diego-Baja region.
- 9) A **tax incentive program** should be considered to reward private firms that support ecotourism or cultural tourism in some measurable way.
- 10) Protection of cultural sites needs to be better integrated into the environmental impact review process. Often, the cultural impact of development is hardly mentioned in EIR studies.
- 11) An urban design study should be commissioned, in which tourist zones are identified and assessed in the region. They would include: San Diego waterfront, downtown San Diego, Balboa park, Old Town, Tijuana's beach (Playas) area, downtown Tijuana, San Ysidro, etc. The study would focus on existing places, whether they are easily accessible to tourists, transit infrastructure changes that might incorporate them into the region; and urban design strategies that would make these locations more enjoyable to visitors.

#### **CONCLUSION**

The San Diego-Baja region has enormous untapped potential in expanding its regional economy from tourism development. The comparative advantages of climate, geography, scale, and international culture offer many opportunities for enhanced tourism development. What must be overcome are the potential frictions of overdevelopment, the negative image of Mexico and the border fueled by often inaccurate or overstated media reports, and the potential inconvenience posed by crossing the international border. New approaches to tourism development and marketing are strongly urged. In particular, as stated above, tourism must be viewed as more than "mass tourism" to star attractions and beach/ golf resorts. The San Diego-Baja region is filled with culturally and ecologically rich sites that could be part of a different layer of the visitor industry, a "new tourism."

Recently, governments, especially in Europe, have begun to recognize "tourism planning" as a significant practice. This would be an important direction for the San Diego-Baja region. The timing is excellent. On one side, the momentum of NAFTA will be further propelled by the recent election of new Mexican president Vicente Fox, who will take office in December 2000. Fox, the first Mexican president from an alternative political party, the pro-business National Action Party, is advocating a more open border, and an emphasis on building cross-border trade. This bodes well for San Diego-Tijuana, especially since the U.S. government has been pushing NAFTA. The strong economy in California-Baja California in 2000 will further leverage new investments in tourism development in the region.

There is also an emerging pattern of commitment toward cross-border management of the regional economy. SANDAG's bi-national initiative with the Mexican government-- the Committee on Binational Regional Opportunities (COBRO) matches Tijuana's new planning office, the Institute for Municipal Planning (IMPlan), in transportation planning, and environmental cooperation. The next step is to get these agencies involved in cross-border tourism development.

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