

A JAGGED PATH: TOURISM, PLANNING, AND DEVELOPMENT IN MEXICAN  
WORLD HERITAGE CITIES

By

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To Stephanie Shieldhouse, for supporting, enabling, and enduring

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UNESCO's World Heritage list created an institution that recognized the "best of the best" (Cameron 2005, 1) of the planet's cultural and natural heritage. Although many of the earliest sites named to the list were famous landmarks that were already major tourist attractions, subsequent additions to the list were less well known, and the presence of thousands of new visitors can threaten centuries-old cultural heritage as well as buildings and neighborhoods.

There is evidence that World Heritage inscription can trigger an influx of tourists to World Heritage sites, although demonstrating a relationship between inscription on the list and visitors has proven elusive. This dissertation uses statistical evidence from seven Mexican World Heritage cities to demonstrate that joining the World Heritage list has a significant independent impact on international tourism at World Heritage cities. This effect may take from one to eight years to occur, with a mean of 5.8 years and a median of 6.5 years. A statistically significant relationship between inscription and international arrivals could not be demonstrated at one of the seven World Heritage cities.

Although the seven Mexican World Heritage cities considered here typically experienced increased international visitors after joining the list, scrutiny of the data revealed wide variation in visitor trends over the long term. The investigation examined two case studies of Mexican World Heritage cities that joined the list in the late 1980s and early 1990s. The two cities—Guanajuato and Morelia—revealed distinctly different trends in the years after 2000, with Guanajuato demonstrating a 43.2% decrease in international visitors between 2000 and 2008, while Morelia experienced a 25.6% increase over the same period—despite a 2008 Independence Day bombing in that city’s historic center, which had a catastrophic impact on tourism during the fourth quarter of that year.

Through these two cases, this research explores the reasons why such a variation can occur, with a specific eye toward identifying impacts related to public policy and planning in those two cities.

## CHAPTER 1 INTRODUCTION

### **Background**

Since its inception in 1972, UNESCO's World Heritage list has become a recognized symbol of the world's most important cultural and natural sites. Tourism was not part of UNESCO's original rationale for the list, which now includes 911 properties (UNESCO, World Heritage Center d), but the tourism impacts were quickly recognized. It has evolved to symbolize the best places to visit—an alternative to *Frommer* or *Fodor's*, or even perhaps a kind of alternative to the alternatives, such as *Lonely Planet* and the *Rough Guides*.

The roots of the World Heritage movement trace to 1959 when the governments of Egypt and Sudan appealed to UNESCO to safeguard the Abu Simbel temples, which were then threatened by flooding attributable to the planned Aswan High Dam in Egypt. (UNESCO, World Heritage Center c) The World Heritage Movement, largely driven by United States initiatives during both Johnson and Nixon administrations, was formally launched with the November 16, 1972, adoption of the Convention Concerning the Protection of the World Cultural and Natural Heritage.

The Convention justified UNESCO intervention because protection of the world's heritage is part of the Organization's mission and because of a demonstrated need to extend protection to cultural and natural heritage resources in countries with "insufficient economic, scientific, and technological resources" (UNESCO, 2005).

The 1972 Convention defined "cultural" and "natural" heritage and mandated that State Parties to the Convention support heritage through policies, services, training, research, and finance. Such efforts would also be supported by a World Heritage Fund.

Article 11 prescribes creating a list of properties with “outstanding universal value,” which would be published as the World Heritage list. (UNESCO, 2005). It also calls for a “list of World Heritage in Danger,” which identifies properties on the World Heritage list threatened by “serious and specific dangers” (ibid.).

What is outstanding universal value? UNESCO’s management guidelines provided this definition: “Outstanding universal value means cultural and/or natural significance which is so exceptional as to transcend national boundaries and to be of common importance for present and future generations of humanity.” It continued, “to be deemed of outstanding universal value, a property **must also** [emphasis theirs] meet the conditions of integrity and/or authenticity **and must** [emphasis theirs] have an adequate protection and management system to ensure its safeguarding” (UNESCO, Intergovernmental Committee for the Protection of the World Cultural and Natural Heritage 2008).

Apart from a reference in Article 11 to threats from tourist development projects, the 1972 Convention makes no reference to tourism, although it became apparent to observers that there is a relationship between inscription on the World Heritage list and tourism. Indeed, subsequent UNESCO publications acknowledge that inscription “brings an increase in public awareness of the site and its outstanding values, thus also increasing the tourist activities at the site (UNESCO, World Heritage Center c).

As World Heritage sites may stimulate tourism, they also depend on tourism. Both natural and cultural heritage sites require constant funding streams for preservation, ongoing maintenance, and improvements. Consequently, World Heritage sites—both natural and cultural—are frequently dependent upon the economic benefits derived from

the tourists that they attract. Such benefits are at the same time offset by an increase in negative externalities of crowding, increased wear on existing infrastructure and need for additional infrastructure, increased needs for preservation, and protection from over-commercialization. A potential result of membership on the World Heritage list is noticeable diminution of the uniqueness and sense of place that had originally defined that cultural asset as special.

This points to the often-highlighted phenomenon of tourism as both a blessing and a bane for World Heritage cities. The former Director of UNESCO's World Heritage Center summarized it as follows:

Tourism is, however, a double-edged sword, which on one hand confers economic benefits through the sale of tickets and visitor spending on hotels, restaurants, and other tourism-related services, but on the other, places stress on the fabric of destinations and the communities who live in them. Venice, my home city, is a case in point since it benefits financially from its buoyant tourism industry, but struggles to cope with the attendant conservation problems associated with such a large annual influx of tourists. (Bandarin 2005, v)

As the number of World Heritage sites grew from twelve in 1978 to 911 by September 2010 (UNESCO, World Heritage Center d), awareness of problems related to such a profusion appeared to increase. A *New York Times* article on the perils of World Heritage list expansion, especially within the context of Mexico, suggested that many are wondering, "Is this rapid growth watering down the List's meaning?" (Kugel 2006). The article highlights Yucatán as providing "lessons in what can happen after a site makes the list." It notes that Chichén Itzá's visitor levels mushroomed after World Heritage list nomination, "with peak months bringing more than 5,000 visitors a day, according to Yucatán government statistics."

In brief, the inscription process entails four steps:

- Individual countries or “state parties” develop a preliminary list from which nominations can be drawn. According to UNESCO, “this ‘inventory’ is known as the Tentative List, and provides a forecast of the properties that a State Party may decide to submit for inscription in the next five to ten years and which may be updated at any time.”
- Nominations for individual World Heritage sites are prepared by the state parties, often with the assistance of UNESCO’s World Heritage Center, in Paris.
- Submitted nominations are reviewed by one of two advisory bodies: the International Council on Monuments and Sites (ICOMOS) or the World Conservation Union (IUCN), which respectively advise regarding cultural heritage sites and natural heritage sites.
- Evaluated nominations are submitted to the World Heritage Committee at its annual meeting (UNESCO, World Heritage Center).

Anna Leask, in summarizing current issues in World Heritage site designation and management, highlighted the politicized nature of the process by noting: “UNESCO does not nominate nor invite nominations for sites that they deem appropriate—instead it is the central governments within each States Party that do this” (Leask 2006, 15).

Tourism is not incidental to World Heritage sites. If anything, it is the lifeblood of these places that are typically endowed simultaneously with enhanced needs for preservation and limited opportunities for conventional development. As a consequence, much attention has focused on the relationship between World Heritage and tourism, and this relationship has been the subject of much discussion and numerous quantitative studies. Such studies usually focus on whether joining the exclusive club of World Heritage sites results in increased visitors. The results generally have been inconclusive, in many cases because of insufficient data. Examples include works by Ralf Buckley (2004, 82) and Myra Shackley (2006, 83).

With thirty-one natural and cultural World Heritage sites, Mexico is a particularly fertile case for investigating these relationships. Mexico's economy is highly dependent on tourism, especially from the North America. The nation supports a large number of governmental and academic institutions that study tourism and related functions, such as archaeology. Consequently, Mexican thinking and discussion about tourism and World Heritage is extensive and sophisticated. Mexico is home to ten World Heritage cities, including part of its capital, Mexico City, with only Italy, with sixteen World Heritage cities, and Spain, with thirteen, having more recognized cities. This contrasts with the United States and Puerto Rico, which have twenty-one natural and cultural World Heritage sites, but not a single World Heritage city. Federal regulations stipulate that "non-Federal property may be nominated to the World Heritage List unless its owner concurs in writing to such nomination. There are also provisions requiring statements by owners of private property that appropriate preservation measures will be sustained "(Code of Federal Regulations). Mexico's relative profusion of World Heritage cities makes it an appropriate place to study the outcomes of urban places when joining the World Heritage list.

Does World Heritage list inscription<sup>1</sup> correspond with increased tourism in Mexico's World Heritage cities, and how does World Heritage inscription affect the public policy and planning that determines future changes in these places?

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1 Reflecting UNESCO's Parisian roots, "inscription," which, translated from the French, means "enrollment." It is the term of art equivalent to joining the World Heritage List.

## **Justification for the Study**

Given the important role of tourism for supporting World Heritage sites and, in particular, World Heritage cities, urban planners and managers need to understand and manage the principal impact of inscription, namely: the potential arrival of many visitors. Tourism data are needed to plan for facilities necessary to accommodate increased visitors, including hotels, infrastructure, tourism reception centers, etc. These facilities will require other resources. Capital and operating flows will be required to build and maintain new facilities as well as to support preservation efforts for cultural heritage that may be subjected to increased wear—or even abuse—from more visitor traffic. Tourism-related businesses will require increased staff and improved training in order to handle increasing visitor volumes and a potential change in the visitor mix.

The ramifications of World Heritage inscription are numerous and complex. Proper planning, strategy, and management require information about expected tourism impacts. The following core questions will be addressed by this study:

- Is there a statistical relationship between World Heritage list inscription and increased tourism?
- What are the dimensions of this increase?
- What is the timing of this increase?
- Going beyond the immediate impacts of inscription, what practices and behaviors determine the success or failure of World Heritage sites at retaining and growing visitor levels?

Armed with such information, a new or prospective World Heritage Site would be better equipped to plan for and to manage increased visitor levels, while employing best practices to maximize the quality of the visitor experience, promote thoughtful

preservation of its cultural heritage, and assure predictable levels of visitors and concurrent economic benefits.

As the World Heritage Movement evolves from a relatively new phenomenon into a mature institution, new information and new perspectives bring new thinking about the process. While much of the prevailing approach to the relationship between tourism and inscription has been concerned largely with the immediate impacts, this research assumes a broader perspective. The line of inquiry here expands from simply whether or not there is a relationship between inscription and tourist levels to one that considers the “gestation period” required between inscription and a statistically significant increase in visitors. It considers the behaviors of government planners, tourism officials, and public managers who determine whether World Heritage cities continue to attract visitors more than a decade after they join the list, or whether they stagnate and become as much a burden as an asset.

The availability of twenty-four years’ worth of Mexican tourist arrival data from the Mexican federal government enables this investigation to go beyond the more immediate effects on inscription, and to identify trends that appeared in many cases more than ten years after a city joined the World Heritage list.

Mexico’s Secretaría de Turismo (SECTUR) collects data on hotel rooms, foreign and domestic tourist arrivals, available rooms, and length of stay for a wide range of destinations, including archaeological sites such as Chichén Itzá, “sun-and-sand” attractions such as Cancún, and day tourists to border cities such as Tijuana and Ciudad Juárez. This investigation considered only foreign arrivals to World Heritage cities.

The Mexican domestic market was excluded for two reasons. First, domestic visitors have a wide range of motivations for visiting a historic city, including academic or vocational training, family events, and local festivals. Second, SECTUR data reflect domestic and international tourist arrivals at hotels. Domestic tourists are perhaps more likely to stay with friends or family or make day trips, reducing the accuracy of SECTUR-reported hotel arrivals as a means for measuring arrivals of Mexican nationals. International visitors to cultural sites are more likely to occupy hotel rooms and are more likely to visit World Heritage cities for their cultural attributes.

The focus of the investigation is on inscription's impact on World Heritage cities. It would also be interesting to understand the effect of inscription on natural or archaeological World Heritage sites, or to compare listed and non-listed heritage cities. While this study may provide limited insights into these other issues, they certainly merit their own distinct research and are not the focus of this investigation.

### **Research Objectives**

The study employs a mixed-methods approach to understand a) the short-term implications for international tourism arrivals of inscription on the World Heritage list and b) the reason why international visitors over the longer term may increase at some World Heritage cities and decrease at others.

The approach includes a statistical component, which developed a series of exploratory models for seven World Heritage cities in Mexico. This is followed by a case study examination of two such cities that manifested different trends in foreign arrivals in the second decade after inscription.

The hypothesis of the component study is that, all things being equal, World Heritage cities demonstrate a significant increase in tourism as a direct and

independent result of inscription on the World Heritage list. Stated in purely statistical terms, the null hypothesis for the quantitative analyses is that World Heritage cities do not reflect increases in international visitors as a result of inscription that are significant at a .05 confidence interval.

An exploratory analysis was employed using the Proc Mixed routine of SAS<sup>®</sup> 9.2<sup>2</sup>. The methodology involves assembling longitudinal data sets for each World Heritage city, drawing upon data dating from 1986, the first year for which SECTUR data are available, through 2008. As of this writing, 2009 data are available; however, the multiple disasters of the H1N1 influenza outbreak, the post-Lehman Brothers financial meltdown, and increasing bloodshed in Mexico related to illegal drugs and drug cartels, contributed to an anomalous decline in Mexican tourism during 2009, making it difficult to generalize.

World Heritage list inscription was defined with a categorical or dummy variable with a value initially set to 0 for the period prior to inscription and to 1 for years hence. In an exploratory mode, the date for which the value transitioned from 0 to 1 was advanced until a positive coefficient for the variable significant at a .05 confidence interval was achieved. Four control variables were specified so that the independent effect of inscription could be isolated. These variables were based upon data provided by SECTUR, the International Monetary Fund (IMF), and the United Nations World Tourism Organization (UNWTO). Available hotel rooms in each World Heritage city were derived from SECTUR data. This variable was considered relevant because the

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supply of lodging influences both price and convenience of a destination, both critical considerations for travelers. The IMF provides data on the strength of various currencies versus a basket of currencies, Special Drawing Rights (SDR). A variable defined by the number of Mexican pesos per SDR was included to measure the price of Mexico relative to other destinations. As the number of pesos per SDR increases, Mexico becomes relatively cheaper than other countries, and—all else remaining equal—becomes a more attractive destination. A third control variable was the number of global international arrivals, as reported by UNWTO. The number of people visiting World Heritage cities may vary because people are traveling more or because they are traveling less. The motivations for increased travel could be increased affluence, better air transport, and lower fares. Likewise, fewer people may be visiting World Heritage cities because of economic uncertainty or security concerns. Including the UNWTO data as a variable accounts for such variation in a general way. Minus these control variables, the calculated World Heritage dummy variable would have been less precise and less valuable, because it might have been capturing variation attributable to those other factors influencing travel.

A second hypothesis of the study is that the positive impact of World Heritage Inscription on Mexican World Heritage cities is not immediate. It takes a period of several years for word to spread that the inscribed site is worth visiting. Likewise, some World Heritage sites may not be particularly well equipped to handle the amount and type of visitors who may appear after inscription. The exploratory nature of the analysis, which involved advancing the year at which the dummy variable transitions from a value of 0 to a value of 1 provided a mechanism for determining how many years were

required after inscription for Mexican World Heritage sites to experience significant increases in international visitors.

The case study analysis sought to examine the hypothesis that long-term changes in the number of visitors to Mexican World Heritage cities are influenced by public policy. The statistical evidence suggests that although these cities may initially experience increases in visitors due to inscription, but that their long-term success may attribute to the ability of public officials to succeed in the following areas:

- promotion;
- planning;
- management; and
- ability to work with various actors involved in the process, including the private sector, citizens, non-governmental agencies, etc.

The research investigates these factors through two cases from Mexico's Central Highlands: the Historic Town of Guanajuato and Adjacent Mines and the Historic Center of Morelia. These two World Heritage cities were inscribed on the list between the late 1980s and early 1990s. Both cities are within five hours reach by bus from Mexico City, and both are in proximity to other natural, historical, and cultural destinations.

Guanajuato, for example, is less than seventy-five minutes from San Miguel de Allende, a recent addition to the World Heritage list and popular with North Americans for its cultural offerings catering to English speakers, such as art, Spanish language, and cooking schools, and numerous galleries. Guanajuato is also closer to Dolores Hidalgo, known for *El Grito* (literally, "the cry") and the beginnings of Mexican Independence from Spain 200 years ago. Morelia is the capital of Mexico's state of Michoacán, home to the Monarch Butterfly Biosphere Reserve, a natural World Heritage Site, which joined the

list in 2008. Nearby Pátzcuaro draws tourists annually to its Day of the Dead celebrations in November. The Day of the Dead was inscribed on UNESCO's Intangible Heritage list in 2008. Michoacán abounds in traditional villages with tourist appeal, some built near large Pre-Columbian structures. A 2010 addition to UNESCO's Intangible Heritage List is Traditional Mexican Cuisine—Ancestral, Ongoing Community Culture, the Michoacán Paradigm.

Although Mexico has ten World Heritage cities, no two have been developed alike. Guanajuato and Morelia were selected for the case studies because they experienced different outcomes with respect to long-term tourism trends after inscription, despite similarities with respect to the timing of inscription and their location.

### **Limitations of the Research**

The observations and conclusions resulting from this study must properly be viewed within the context of numerous limitations. Prominently, the study concerned only Mexican World Heritage cities. While the results might help one to understand the impact of World Heritage list inscription at World Heritage cities in other countries or at other natural or cultural World Heritage sites, they have no unqualified applicability to such situations.

Further, within the limits of Mexican World Heritage cities, the analysis focused on the impact of World Heritage list inscription on international arrivals and excluded domestic arrivals. One needs to be careful in applying this study's findings to trends related to domestic visitors to World Heritage cities. The more general nature of the findings derived from the case study analysis suggests they may have more relevance to domestic visitors and other situations.

In making inferences from this analysis, one must remember that data evaluated in the exploratory statistical analysis reflect observations from 1986 to 2008. The circumstances and events related to this period may limit the ability to apply the conclusions to the future. Most of Mexico's World Heritage cities were inscribed on the World Heritage list during a narrow window between 1987 and 1991. Calculated results may be limited by the paucity of pre-inscription data in some cases. Additionally, one should not exclude the possibility that the economic and political environment in Mexico, particularly during the 1990s may have colored the study's findings, reducing their applicability to other situations.

As the statistical analysis was exploratory and iterative in nature, it would be incorrect to over-generalize from the results. Critics might question the validity of this approach, because it effectively involves "fishing" for a desired result. Acknowledging this limitation, the analysis indicated that for six of the seven World Heritage cities under scrutiny, inscription was followed by statistically significant increased levels of international visitors, assuming a .05 confidence interval. Such increases required between one and eight years to materialize, with a mean of 5.8 years after inscription and a median of 6.5 years.

### **Significance of the Research**

Despite these limitations, the research provides valuable insights into the apparently elusive relationship between inscription on the World Heritage list and tourism and the behaviors necessary for World Heritage cities to preserve and enhance their tourism base. It also provides new insights into the complexity of the relationship between inscription and tourism. This research suggests that inscription does invite increased tourism. The degree of increase, however, may be a function of many other

variables in addition to membership on the World Heritage list. Over a long-term horizon, the influence of inscription can be affected markedly by public policy and planning at the local level. The cities that develop detailed, actionable plans that involve the principal actors in the community in planning and management can expect to sustain higher levels of international visitors and more resources for conservation than those with thinly articulated, inconsistent plans that ignore the needs and communities of different local actors.

Furthermore, this research provides the basis for further and related research to address related questions, which may include the following:

- What is the relationship between World Heritage list inscription and tourism for other (non-urban) cultural sites and for natural sites?
- Could similar results be found with World Heritage cities in other countries?
- Were these conclusions from Mexico an anomalous result dictated by the unique circumstances of that country and the time period during which most Mexican World Heritage cities joined the World Heritage list?
- The case study contrasting two Mexican World Heritage cities produced one set of conclusions. What would more examples and more information tell us about the impact of public policy on international visitor numbers in World Heritage cities?

Although inspired by this analysis, these questions are beyond the scope of this study.

## CHAPTER 2 REVIEW OF LITERATURE

### **Overview**

The literature review contains three sections. The first section deals with the core question: does inscription on the World Heritage list lead to increases in tourism? The second section concerns management and planning aspects of heritage tourism. There are multiple definitions of heritage available—some vague and some quite explicit. Heritage resources and World Heritage cities require planning, but poor concepts of the meaning and implications of heritage can contribute to planning and management of heritage resources that neglects local actors, leading to unfavorable outcomes. World Heritage cities with solid planning and management plans that consider local heritage tend to be more successful. The third section considers the Mexican experience with tourism in general and heritage tourism, in particular.

### **Does World Heritage Inscription Stimulate More Visits to World Heritage Cities?**

There is anecdotal evidence that a distinct subculture of well-educated and affluent tourists seek to visit World Heritage sites, as one observer notes, “The American heritage traveler is older, better educated, and more affluent than other tourists” (Buckley 2004). Arguably, the extent of direct impacts of World Heritage inscription has not been completely analyzed. A review of the literature reveals a general agreement that there is a relationship between inscription and tourism, but little empirical evidence of a correlation.

A case can be made for more research to help understand the nature and intensity of the relationship between World Heritage inscription and tourism at World Heritage cities. Further, there also is a need for understanding the longer-term trends in tourism

at World Heritage cities and for identifying influences other than inscription that may influence the preservation of such cities as well as their appeal to visitors. This is especially important in the case of Mexico, where tourism—and cultural tourism—have become the third largest source of foreign exchange “after oil and remittances” (Gould and Levin 2010).

There is a generally accepted view that inscription on the World Heritage list brings increasing amounts of visitors and with them economic growth, but the assumption has not been methodically studied. Brijesh Thapa summarizes the situation as follows: “there is a paucity of empirical research that actually confirms the correlation that designation of a World Heritage Site truly results in increased visitation” (Thapa 2010).

The assumption that World Heritage Site designation leads to increased publicity and higher visitor levels is a central theme in UNESCO’s 1998 *Management Guidelines for World Cultural Heritage Sites*. Its authors state that “the designation of a site as World Heritage implies changes. Increased numbers of visitors demand new facilities and bring more traders” (Feilden and Jokilehto 1998). Myra Shackley’s work added some nuance to this assumption. Based on a review of ten case studies, Shackley concluded that “it is frequently assumed that any site awarded World Heritage status will immediately receive a marked increase in visitors. However, this is not necessarily the case and visitor numbers depend on a number of factors including the way in which the site is marketed and issues connected with access” (Shackley 2006, 83). In other words, World Heritage designation is not enough. She further asserts that lesser-known sites attaining World Heritage status (such as Biertan, Romania) see hardly any

increase in visitors, while better-known sites (Easter Island or Rapa Nui, for example), are so famous that most people would expect them to already be on the World Heritage list. Consequently, they see no increase in visitors.

Shackley and others fail to consider another possibility, namely that the World Heritage designation may contribute to an initial burst of interest, only to be followed by declining visits due to unfulfilled expectations, or poor planning and management.

Alan Fyall and Tijana Rakic (Fyall and Rakic 2006) review this issue and conclude, “One question that is repeatedly asked but fails continually to be answered fully is the extent to which inscription does actually contribute to higher visitor numbers at sites previously not on the World Heritage list.”

The same authors reference an observation by former World Heritage Center head Francesco Bandarin, who noted, “In internationally well-known sites, such as the Tower of London, World Heritage status may have little impact on visitor numbers, but in less established destinations inscription is usually accompanied by an upsurge in tourism” (Harrison and Hitchcock 2005).

This was underscored by a 2007 review of visitor surveys undertaken in different sites in the UK, which described World Heritage status as less important for the Tower of London than the “Jurassic Coast World Heritage Site,” although the wording of surveys may have contributed to the variance. Overall, the review found “heritage is a key motivator for domestic and overseas visitors,” however, based on evidence from the Tower of London and Jurassic Coast, World Heritage status appears to have marginal impact on the motivations of visitors (PricewaterhouseCoopers LLP 2007). The study also found that “the additional funding generated by World Heritage site status improves

conservation levels and the increased publicity provides greater scrutiny in planning applications influencing the scale and quality of local development' (ibid.).

On the other hand, there is evidence of a strong relationship between the number of World Heritage sites in a country and the number of international tourist arrivals. One study found a correlation coefficient of 0.75 between the number of sites in January, 2000, and international tourist arrivals during 1994-1995 (The most recent years available at that time) (Lazzarotti 2000, 12). The author suggests this confirms the belief that tourism and heritage are inextricably linked. While it is difficult to argue that World Heritage sites are not a tourist draw, this correlation could just as likely be evidence that countries with tourism-dependent economies, such as France, Italy, Spain, and Mexico, are particularly diligent about getting their sites on the World Heritage list.

With respect to measuring the relationship between World Heritage inscription and tourism, a study by Ralf Buckley of Griffith University in Queensland, Australia attempted to demonstrate the marginal contribution of World Heritage listing to tourism by comparing time-series data for listed sites and comparable unlisted sites during simultaneous periods. The comparison between listed and unlisted sites was necessary, he said, because "visitor numbers at WHAs may be affected by a wide range of economic, logistic, and market factors as well as World Heritage listing itself" (Buckley 2004). Such an approach appears to assume a degree of homogeneity among listed places and among unlisted areas. Probing a bit further, one might question that assumption, for, as Myra Shackley noted above, different World Heritage sites exhibit different abilities to attract visitors after inscription on the List. Further, cultural and natural heritage sites that are not on the World Heritage list and lacking the selection

criteria and management stipulations of the World Heritage program, would likely see more variation than within World Heritage sites alone. One could argue that analyzing only World Heritage sites—before and after inscription—avoids the specter of such unexplained factors by virtue of an inherent heterogeneity. These issues highlight the danger of relying solely on statistical analysis and the need for qualitative analysis.

Buckley identifies numerous analytical problems that are helpful for investigating World Heritage cities in Mexico. For example, he notes that World Heritage actually implies a “bundle of attributes which includes heritage value, branding, marketing and often increased infrastructure funding” (Buckley 2004, 72). Buckley concludes that “most of the World Heritage Areas (WHAs) considered here received several times more visitors than the control sites, but it is not clear whether the difference is because WHAs are larger or more accessible, because they are better-known, because they are listed as World Heritage, or because they contain features of natural or cultural heritage which the others do not” (ibid., 82).

An earlier study by Buckley, (Buckley 2002) also observed that examining both World Heritage sites and “control sites” can help to “distinguish the icon value effect of World Heritage status from the many other large-scale factors which may influence visitor numbers and origins.”

According to Shackley and Buckley, visitor statistics at heritage sites may not be kept or may be unreliable. Data collection was further complicated, van der Aa observes, because information on the effect of heritage on tourists requires further information about motives. The regression approach used with this study addresses that

problem by using statistics to control for variables, which effectively represent tourist motives.

Van der Aa also examined visitor trends for fifty-one World Heritage sites to understand the effect of inscription. He notes that the assembled data were “based on what respondents think, not on concrete statistics” (108).

Van der Aa’s study concludes that non-centrally located World Heritage sites see larger increases after inscription than do centrally located World Heritage sites. He offers three reasons for these World Heritage sites experiencing abnormal increases in visitors: (1) World Heritage sites may be included in tourist routes, (2) World Heritage status can lead to more intensive promotion, and (3) World Heritage status may promote additional media attention.

The author provides some discussion of tourist routes within the context of Mexico and notes that “in Mexico the World Heritage sites that lie along a tourist route witness the largest increase in international visitors” (115). He notes that Puebla, Oaxaca, and Palenque benefited more from the designation, while Morelia, Guanajuato, and Zacatecas only received more national visitors owing to their low accessibility.

It is not entirely clear what the author means by “tourist routes” and some of his conclusions appear counterintuitive. Morelia, Guanajuato, and Zacatecas are on a clear path from the country’s capital, although the latter city is a bit more remote, at 376 miles from Mexico City. None of the three are particularly remote. As we will discuss later, Mexican tourism data demonstrated post-inscription increases in foreign visitor arrivals to Morelia, Guanajuato, and Zacatecas.

The influence of World Heritage inscription on tourism promotion and marketing was measured by a survey of businesses near two of New Zealand's World Heritage sites. The results found nearly one-half of the respondents (48.4%) believed the designation plays a role in attracting visitors. Another 31.3% indicated they did not know whether World Heritage inscription has a role in attracting tourists. Only 20.3% indicated it has no role (Hall and Piggin 2002, 401). The authors referenced their work from the previous year, which indicated "a causal link between World Heritage listing and increased visitation over and above existing tourism trends is somewhat tenuous."

A report prepared for UNESCO (Prud'homme 2008, 1) reviewed three recent efforts at understanding the effect of World Heritage inscription. The first, a comprehensive review of 200 works in the literature by Maria Gravari-Barbas and Sébastien Jacquot (2008), found a tenuous link between inclusion on the World Heritage list and tourism. The authors concluded one cannot reduce the relationship to a single statistic. There appeared to be a correlation between the number of World Heritage sites in a country and the number of visitors to a country, although the paper also properly noted that the correlation cannot be confused with causality. In concluding, Prud'homme, an economist, notes the shaky analytical foundations of many assertions regarding the link between joining the World Heritage list and increased tourism. "Rare are the studies and the statistics that provide methodological guarantees sufficient for seriously valuing the impact of inscription upon visits,"<sup>1</sup> he noted (ibid., 6-7). The author further observes that Mexican archaeological sites with the World

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<sup>1</sup>My translation.

Heritage designation receive four times the visitors of those without the designation; however, he cautions that the difference may be due to more intensive promotion.

A study using France as a case employed multiple regressions to understand the independent effect of World Heritage inscription (along with eleven other variables) on twenty different independent variables for various tourist destinations and came up with a different conclusion. The study concluded that the impact of inscription ranges from feeble to nil. Indeed, it finds the Michelin three-star ratings (formerly “worth a trip”) and two-star ratings (formerly “worth a detour”) have more explanatory value than does World Heritage inscription (*ibid.*, 8-11).

The third study examined seven case studies of heavily visited cultural sites in Turkey—both with and without World Heritage status. The researchers interviewed an array of people responsible for preserving those sites (both archaeological and urban). From sixteen responses, they concluded that World Heritage inscription has little impact. The author recognized the limitations of such a small sample comprised exclusively of preservationists (*ibid.*, 19).

The analyses cited by Prud'homme both used the same overall approach as did Buckley; that is, comparing World Heritage sites with similar sites that lack inscription on the list and identifying the differences. Prud'homme notes (*ibid.*, 2) that scientific judgments on the socio-economic impact of inscription cannot merely look at what really happened but must look at what would have happened in the absence of inscription. By implication, an analysis would be indefensible if it did not account for wider trends either by comparison with sites that have not been inscribed or by including variables that would reflect global trends.

## Management and Planning Aspects of Heritage Tourism

Heritage has multiple meanings that have evolved over more than fifty years. With multiple notions of heritage circulating, there is no universal notion of its importance and relevance.

In more orthodox usage, heritage, or patrimony, to use a term more akin the French word *patrimoine*, refers to that which is inherited from one's ancestors. With the above statements, that which had previously been considered a family matter, a tribal matter, or even a national matter, became something under the purview of a global body.

The evolving definition of heritage has been documented by several authors. As David Lowenthal noted, "Fifty years back, book titles and indexes suggest, heritage dwelt mainly on heredity, probate law, and taxation; it now features antiquities, roots, identity, belonging" (1996, 3). A similar evolution was observed and expanded by Ashworth and Tunbridge, who observed that heritage formerly had a more simple meaning related to what one inherits from deceased ancestors. With modern notions such as shared heritage and "outstanding universal value," heritage has taken on wider meanings. Heritage can be:

- a synonym for a specimen from the past; this notion began with museums, but evolved to include public works, crafts, and folklore;
- all cultural material from the "collective memory" or "national memory," including material items and works of art;
- elements from the natural environment, such as "heritage landscapes" and "heritage trees;" and
- the heritage industry, "which is based on selling goods and services with a heritage component."

Ashworth and Tunbridge contrast “heritage” with “history.” The latter, they noted, is “what a historian regards as worth recording.” Heritage is “what contemporary society chooses to inherit and pass on.” Heritage is far more dependent on the manner in which it is interpreted, and this interpretation lends itself to becoming transformed into a product through a “commodification process” (Ashworth and Tunbridge 1996, 7).

Lowenthal touches on this difference in *The Past is a Foreign Country*. He noted that history extends and interprets relics, but, “no physical object or trace is an autonomous guide to bygone times”. Relics, that is, artifacts of heritage, rather than history, “require interpretation to voice their reliquary role. Otherwise they are mute and they are static” (Lowenthal 1985, 238).

This latter aspect of heritage has interesting implications for places like Mexican World Heritage cities, which are distinguished by an “aura of antiquity” in “much-preserved locales.” Lowenthal argued that this aura “does not really connote historical vitality but a dearth of later innovative energy” (ibid., 243). The result is a curious situation in which places known for their historical significance paradoxically exist in a state of historical stagnation. A place may have historical significance, but those responsible for the management of these locations, “pickled in aspic” (ibid., 244), are effectively responsible for interpreting their artifact for visitors; from this can arise myriad problems with historical accuracy, authenticity, and respect for tradition.

This was amplified by John Urry, who observed that “heritage history is distorted because of the predominant emphasis on visualization, on presenting visitors with an array of artifacts, including buildings (either ‘real’ or ‘manufactured’), and then trying to visualize the patterns of life that would have emerged around them” (Urry 2002, 112).

Elaborating on these notions in her work on “toxic tourism,” Phaedra C. Pezzullo describes how tourism offers a “counterexperience” of everyday life—something different or perceived as different from the daily routine (Pezzullo 2007, 43). For most international tourists, World Heritage cities would appear to fit that description, and managers of these cities as tourist attractions would want to maximize their “differentness” from modern experience.

Dean MacCannell compared this “differentness” to the attraction to religious symbolism for primitive peoples, building from a line of inquiry developed by Émile Durkheim (MacCannell 1976, 2). In an earlier work, MacCannell, argued that religion was being replaced by something that provides similar levels of gratification. The author noted, “The concern of moderns for the shallowness of their lives and inauthenticity of their experiences parallels concerns for the sacred in primitive society” (MacCannell 1973, 590-591). MacCannell contends that sightseeing has replaced religion (ibid., 589). One might also argue, however, that religion in many places—certainly in the Muslim world and in parts of the former Soviet empire—has demonstrably strengthened in parallel with increased tourism. Perhaps a more appropriate position would be that tourism effectively competes with religion and satisfies similar innate human urges—especially an urge for authenticity.

MacCannell compared the urge for authenticity to the market for artificially colored hams and silicone-inflated breasts, which he claims are designed to create an amplified sense of reality. Within the realm of tourism, this drive results in tourist attractions as stage sets or tourist settings being injected everywhere into real settings. (ibid., 591)

Erik Cohen (2004) argues that there are two basic models of attractions: the “natural” and the “contrived.” In post-modern tourism, there exists confusion between history and heritage spawning a kind of contrived heritage attraction that creates its own new reality. Obvious examples of such places include Disney’s EPCOT<sup>®</sup>, a part of the Walt Disney World complex near Orlando, Florida. Cohen suggests tourists are being deflected to contrived attractions, away from “natural” places. Cohen has contrasted his views with MacCannell’s more orthodox views of authenticity. He writes that “‘authenticity’ is a socially constructed concept and its social (as against philosophical) connotation is, therefore, not given, but “negotiable” (1988, 371-372).

These notions link with the concept of “heterotopias” discussed by Foucault, who asserted that such places are mirrors to utopias because they are “placeless places,” in which “all the other real sites that can be found within the culture, are simultaneously represented, contested, and inverted.” Simultaneously, however, there is an operating reality, so that effectively “it makes this place that I occupy at the moment when I look at myself in the glass at once absolutely real, connected with all the space that surrounds it, and absolutely unreal, since in order to be perceived it has to pass through this virtual point which is over there” (Foucault 1986, 22-24).

The inescapable reality is that visitors revere World Heritage cities for their otherness. Competing notions of heritage are relevant because how a city views its heritage can impact planning and policies used to manage cultural heritage resources. The challenge for governments, businesses, and other actors involved with their management is balancing a reality dislocated from the normal with the need for these cities to remain living entities, relevant to their inhabitants and their inhabitants’ heritage,

and not just an “otherness” for outsiders. Likewise, they must recognize the outstanding qualities of places and assure that the value of heritage is not quashed by reckless and insensitive development.

The advantages related to economies of scale, coupled with expensive new technologies available only to the most financially potent firms, and with the more universal cultural expectations of a shrunken (or “flat” world, to use the terminology of Thomas Friedman [Friedman 2007]), combine to create tourist attractions that are at once artificial and blend elements of cultural heritage. An example of this is Kerzner International’s Atlantis resorts in the Bahamas and Dubai, both of which feature large archaeologically themed water slides. The resort company’s website describes its Bahamas water slide as follows: “The Leap of Faith slide offers the daring and adventurous a 60 ft. almost-vertical drop from the top of the world-famous and iconic Mayan Temple, propelling riders at a tremendous speed through a clear acrylic tunnel submerged in a shark-filled lagoon” (Atlantis Resorts). The company’s Dubai resort features a similar slide fashioned as a Middle Eastern ziggurat.

On the other extreme are tourist attractions that grow from and directly reflect history and heritage. While these sites may indeed be more authentic than recent quasi-heritage products, such as the previously described Kerzner International developments, visitor motivations can be diverse. Research on visitors to Israel identified various strata of tourists ranging from those who are unaware of a site’s heritage to those who are motivated to visit a site because it is part of their own patrimony. Knowledge of these varying expectations can lead to better management practices (Poria, Butler, and Airey 2003, 238-254). Likewise, planning for the

exploitation of heritage resources should be cognizant of the unique attributes of each site and each country. Another study noted that successful heritage tourism “requires great care in planning, development, management and marketing, and different approaches may be needed in establishing heritage tourism in developed and developing countries” (Nuryanti 1996, 249-260).

The concept of multiple meanings for heritage and authenticity seems at odds with objectives of the 1972 World Heritage Convention: “the identification, protection, conservation, presentation, and transmission to future generations of cultural and natural heritage of outstanding universal value” (UNESCO, Intergovernmental Committee for the Protection of the World Cultural and Natural Heritage 2005). If authenticity is “negotiable” or if heritage sites are “utopian placeless places,” how then is it possible to have a notion such as outstanding *universal* value?

The 1972 UNESCO convention made liberal use of the term “outstanding universal value,” defining cultural heritage to include monuments, groups of buildings or sites as falling under that rubric if they demonstrate “outstanding universal value” from an appropriate point of view (UNESCO 2005). Despite its lavish use, the only language approaching a definition of the term appears in Article 12:

The fact that a property belonging to the cultural or natural heritage has not been included in either of the two lists mentioned in paragraphs two and four of Article Eleven<sup>[2]</sup> shall in no way be construed to mean that it does not have an outstanding universal value for purposes other than those resulting from inclusion in these lists (ibid.).

Effectively, Article 12 suggests that everything on the two lists clearly has outstanding universal value by virtue of inclusion on those lists, and it opens the door to

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<sup>2</sup> The two lists referred to in paragraph two and paragraph four refer to the World Heritage List and the list of World Heritage in Danger, respectively.

additional inscriptions. Article 12, paragraph 5, indicates that the World Heritage Committee “shall define the criteria on the basis of which a property belonging to the cultural or natural heritage may be included on either of the lists mentioned in paragraphs 2 and 4 of this article” (ibid.).

It has been argued that over thirty-eight years, however, UNESCO has responded to a changing landscape and increased knowledge about cultural and natural heritage by effectively changing its interpretation of “outstanding universal value” to mean “representative of the best” instead of “best of the best” (UNESCO, Convention Concerning the Protection of the World Cultural and Natural Heritage 2005-6).

Recent attempts to document the evolution of outstanding universal value, first by Christina Cameron, in 2005, (Cameron 2005, 1) and subsequently in a 2008 ICOMOS study compiled by Jukka Jokilehto, reveal that the earliest efforts to provide meaningful definitions for outstanding universal value resulted from a meeting of experts prompted by a report from the 1976 UNESCO meeting in Morges, Switzerland, as well as from a series of proposals developed by the International Center for the Study of the Preservation and the Restoration of Cultural Property (ICCROM) (Jokilehto 2008, 1-2). Jokilehto explores the evolving definitions and notes that “the cultural criteria have been modified several times over the course of time.” The Operational Guidelines of 2005 were effectively ratified by the subsequent Kazan Meeting on Outstanding Universal Value. This definition reads as follows:

Outstanding universal value means cultural/and or natural significance which is so exceptional as to transcend national boundaries and to be of common importance for present and future generations of all humanity. As such, the permanent protection of this heritage is of the highest importance to the international community as a whole” (ibid.).

The 2005 Operational Guidelines integrated aspects of the 1994 Nara Document on Authenticity, which “provided a practical basis for examining the authenticity of properties proposed for World Heritage listing (Rössler 2008, 47-52). The result is eight paragraphs (supplemented by the Nara Document) that provide a means of simultaneously creating a universal concept of authenticity, while recognizing cultural variation. This is characterized by paragraph 11 in the Nara Document, which reads:

All judgments about values attributed to cultural properties as well as the credibility of related information sources may differ from culture to culture, and even within the same culture. It is thus not possible to base judgments of values and authenticity within fixed criteria. On the contrary, the respect due to all cultures requires that heritage properties must be considered and judged within the cultural contexts to which they belong. (UNESCO 2005)

The Nara Document and the 2005 guidelines artfully put into play Eric Cohen’s notions that authenticity is negotiable, and recent literature regarding the management of heritage resources advises a sensitivity to multiple viewpoints. With respect to management and planning, it has been suggested that the responses of different markets (such as European versus East Asian) to a cultural site may differ and should be “solved in the early stages of planning” (McKercher and Du Cros 2002).

The beauty of the World Heritage movement is that it recognizes, embraces, and encourages regional differences, while simultaneously imposing standards for planning and management, the absence of which can have unfortunate consequences for historic cities.

Heritage tourism typically has positive consequences for local economies, but if improperly managed, it can have negative impacts on the conservation of heritage properties. A 2006 article in *Newsweek International* noted that tourism is a “double-edged sword,” offering cities the ability to reap financial rewards, while threatening the

resources upon which tourism is built. The author specifically cites the manner in which its 5,000 visitors per day have turned Chichén Itzá into a “Disney-esque mecca” (Nadeau 2006).

The problem is exacerbated by top-down management, which may fail to understand the particular needs of individual communities. For example, the previously described World Heritage nomination and review process endures at least eighteen months. The amount of money and effort required for this effectively represents a barrier to entry for countries with minimal resources that, justifiably, must be dedicated to other contingencies. The PricewaterhouseCoopers analysis in the UK that was referenced earlier reviewed existing literature and estimated bidding costs for World Heritage inscription at £400,000 (PricewaterhouseCoopers LLP 2007), which is equivalent to \$624,840 as of this writing.

Bart J.M. van der Aa and others observed problems arising from a balkanized nomination process, UNESCO’s evaluation process has been criticized as inordinately dictated by its headquarters and the World Heritage Committee, which in the past typically stressed European values (Scholze 2008, 217).

International financial organizations frequently bring in western consultants and staff for such projects in developing countries. Stubbs (2009) notes that organizations such as UNESCO, ICOMOS, AND ICCROM have helped to advance global cultural homogenization, “which began through colonization.” He also observes, however, that such organizations enable foreign experts to meet and interchange ideas, and that recent agreements and policies reveal more sensitivity to local perspectives. Perhaps more importantly, debt financing through such institutions typically relies on the US

dollar as currency. The need to repay such debts demands borrower countries enhance foreign exchange earnings. One common means of doing so is with large-scale international tourism (Mowforth and Munt 1998).

With both visitors and major commercial participants in heritage tourism dominated by developed Western countries, heritage tourism effectively can be described as a new form of imperialism (Smith 2003). Another result, described by David Lowenthal is a “homogenized heritage” that stems from global popularity (Lowenthal 1985). While the patrimony may be diverse, the stories are presented with a common façade, using the same “legacy lingo” (ibid.).

Joseph Scarpaci notes a tension between “nation-state and municipal governments” (Scarpaci 2005). He notes, “As cities scramble to promote the unique selling points of buildings, square promenades, and other landmarks, they confront the great paradox that by making their geographic and market niches universally accessible, they may render them literally meaningless and placeless.”

Such criticisms are somewhat alarmist, at least as applies to World Heritage cities. They are not flies in amber, nor are they Disneyland. They must adapt and respond to residents’ needs as well as those of visitors. A balance must be struck between modernity and preservation. The empirical evidence suggests a range of responses to the need for such a tradeoff, implying less homogeneity than some might suggest.

There have been situations, however, where careless management and planning have clearly harmed heritage. Two Mexican authors have noted that the “installation of services to satisfy the enormous tourism flows have predominantly been the most predatory with the natural and cultural environment” (Vela 2002, 113) (Aceves and

Delgado Lamas 2002, 92). The cultural heritage of coastal resorts is seldom mentioned, and the authors observe that in Acapulco and Mazatlán heritage was decimated with painful results, as new resorts were developed by the Mexican government to attract the “sun and sand” crowd. Alex Saragoza notes, “Acapulco was displaced by the new development facing the aquamarine waters of the Caribbean. Cancún’s near-instant success set in motion the implementation by FONATUR of two additional major resort areas on the Pacific coast, Huatulco and Ixtapa, which, in effect, confirmed the decline of Acapulco as a prime destination for international tourism” (Saragoza 2010, 295-296).

Effectively, Acapulco’s patrimony was sacrificed for perhaps thirty years of glory as a premier seaside resort. Now it is subject to what has been termed “the wrong sort” of tourist, in a work by Barbara Kastelein (2010, 320). The author notes that the prevailing attitude of the Mexican tourism industry is that the “wrong” types affecting Acapulco are Mexican, “especially those from Mexico City. Mexican nationals make up about 80% of the country’s tourists, yet en masse they are considered the type of vulgar visitors who will tend to trash a place on leaving it” (ibid.).

Such failures have provoked a call for more collaborative planning process, and there are frequent references in the literature to the importance of including stakeholders in tourism planning for cultural resources.

Heather Black and Geoffrey Wall note that the top-down “synoptic planning approach” often fails “in the context of using tourism as a vehicle for sustainable development.” They call for a “constructive and creative planning process which incorporates the knowledge, skills, and desires of local people, leading to more secure

monument preservation, a more 'authentic' tourism experience, and improved life opportunities for those living in the shadows of the monuments" (2001, 122-135).

Even in top-down systems, it is possible to open the door to increased involvement of local residents and small businesses. Still, "if 'empowerment' of local people is to become more than just a buzzword or hopeful sentiment, it clearly requires the participation of local communities in partnership with the state, its agencies, and the large operators, rather than being a passive 'host' community that happens to have a major attraction on its doorstep" (Hampton 2004, 752-753).

There are situations where stakeholder considerations become less important. such as with crises require executive action. Brijesh Thapa, in describing Kathmandu's threat from intrusive development and then-presence on the World Heritage Danger list, suggests that coordination of stakeholders, while helpful, deserves a lower priority in dire situations where government action must take precedence (2007, 25-26).

In response to the World Heritage list's apparent bias toward Western European and North American viewpoints, UNESCO's World Heritage Committee launched its "Global Strategy for a Balanced, Representative and Credible World Heritage list" in 1994 (UNESCO 2009). UNESCO proudly pointed to statistical evidence of the Global Strategy's effectiveness. "Since the launching of the Global Strategy," it claimed, "thirty-nine new countries have ratified the World Heritage Convention, many from small Pacific Island States, Eastern Europe, Africa and Arab States" (ibid.). A direct result of a Global Strategy that encouraged more diverse nominations has been an effective redefinition of the amorphous notion of Outstanding Universal Value to reflect, as noted previously, "the best of the best."

Still, UNESCO's Management Guidelines for World Cultural Heritage Sites (Feilden and Jokilehto 1998) impose prescriptions for staffing and management intensity, which may be beyond the reach of less affluent places. As an example, it listed thirty-five different experts and professionals who need to be involved in the management of cultural heritage. These practitioners included ethnologists, hydrologists, landscape architects, and mineralogists. A description of different levels of acceptable staffing which might accommodate different levels of available funding would be more useful, given the range of resources available to different countries.

Such high expectations for management may have contributed to a situation whereby most World Heritage sites designated prior to 1996 still had no management plans (Leask 2006, 15). That source also highlights the lack of legislative power associated with designation as affecting the ability to require and implement management plans. Further, in many other cases, management plans, designed to minimize visitor impact, are not often enforced (Shackley 2006, 83).

Studies around the world have identified numerous social and environmental consequences of tourism. Various socio-cultural and environmental problems associated with poorly managed tourism have been identified. A range of responses to international tourism, including resistance, retreatism, boundary maintenance, revitalization, and adoption, were identified in one article (Dogan 1989, 221). The author Dogan reviewed an array of problems identified as related to tourism in general which apply equally to tourism to World Heritage cities (*ibid.*, 218-220):

- disrupted personal relations linked to increased commercialization and materialism
- increased rates of crime: property crimes and crimes against persons

- increased crowding and noise contributing to negative attitudes toward tourists as well as deteriorating environmental conditions
- problems with physical and mental health
- increased dependency on foreigners, effectively creating a sense of powerlessness and a “new colonialism”

More particularly—and within the context of both heritage tourism and Mexico—still other problems were brought to light in a dissertation on the impact of tourism management practices on cultural tourism destinations (Hiriart Pardo 2006):<sup>3</sup>

- bad attitudes toward local populations, along with consumerism and commercialization
- changes of use from traditional sources and erosion of the cultural landscape
- impact on the infrastructure
- loss of authenticity

The challenge is to minimize these collateral effects while maximizing the array of benefits associated with the other side of the “two-edged sword.”

### **Cultural Heritage Tourism and World Heritage Sites in Mexico**

This researcher’s investigative process began with an unpublished investigation of one city on the World Heritage list—Guanajuato, Mexico and Adjacent Mines, which was inscribed on the World Heritage list in 1998. That investigation theorized that if a statistical relationship between inscription on the World Heritage list and tourism can be proven, models could be provided to planners, managers, and economists to better accommodate and manage the effects of a World Heritage listing, while remaining sensitive to the local community. For example, input-out models could easily be applied the forecast increases in visitors, as they were with the Great Sand Dunes analysis,

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<sup>3</sup>My translation.

which was cited above (Weiler and Seidl 2003, 257). The results from that analysis tend to confirm one aspect of Myra's Shackley's assertion from 1998: the World Heritage listing of Guanajuato in 1988 failed to produce an immediate significant increase in international visitors. However; controlling for several variables—the number of hotel rooms, the relative value of the Mexican peso, effects of the calamity of September 11, 2001—the analysis revealed a significant increase in foreign tourists after nine years (based on historical data from 1986 to 2006).

Tourism is an important component of the Mexican economy. International arrivals in that country rose from two million in 1970 (Clancy 1999, 9) to 17.2 million in 2004 (United Nations, World Tourism Organization 2005). Mexico's tourism industry is centrally planned. Clancy noted (10), "Beginning in the late 60s, the state, through the tourism ministry (SECTUR) and especially through a National Tourism Development Trust Fund (INFRATUR and later FONATUR), took the lead in planning and implementing a multi-year master plan for the country." Likewise, since Mexico's World Heritage sites are under the authority of Mexico's National Institute of Anthropology and History (INAH), Mexican World Heritage cities have been subject to another form of central control. "The INAH's role in managing Mexico's cultural heritage is one of monopoly power, as federal law confers upon it absolute jurisdiction in relation to research and conservation" (Robles Garcia and Corbett 2010, 111-112). The work details recent efforts to reform INAH's role and provides cases where multidisciplinary efforts have achieved success despite the heavy hand of INAH's archaeological bent. Another example demonstrated how community museums have successfully avoided INAH control, in large measure because of community participation (ibid.). As has been

noted previously, proper planning and management of cultural heritage sites is multi-disciplinary and crosses boundaries of public, private, and different segments of society.

Prospects for the future should not ignore such trends, as well as globalization of hotels and minimized participation by local residents. Specifically, with regard to heritage tourism and World Heritage cities in Mexico, there are various tendencies and characteristics that will require intensive management ingenuity.

Mexican World Heritage cities have been divided into three different categories (Cabrales Barajas 2005, 35-36):

- large cities with tourism operating within a diverse urban economy (Mexico City, Querétaro, and Morelia)
- a middle category of cities characterized by a clear specialization in tourism and recovery of their historic centers (Oaxaca, Guanajuato, and Zacatecas)
- emerging historic centers with only incipient pressures from tourism (Campeche and Tlacotalpan)

Cabrales Barajas further notes that 73.4% of foreign visitors to Mexico are from the United States and Canada. The forthcoming mass retirements of the 76 million baby boomers born between 1946 and 1964 represent a vast potential market. These changes will require a different response from both the public and private sector. While Mexican heritage resources, like its natural resources such as petroleum, are essentially inherited, the comparative advantage of the country tends to be outdated if not transformed into competitive advantages in the global economy (ibid.). Echoing remarks noted previously, Cabrales Barajas suggested economic and political conditions in Mexico require mixed solutions, in particular public-private partnerships (ibid.).

Other observers have commented on political roots of management problems for Mexican World Heritage cities. CONACULTA (the parent organization for INAH) and the federal Secretary of Tourism (SECTUR) have been criticized for their lack of “dynamic vision, of responsibility and leadership shared with the municipal governments to generate, upgrade, and apply management plans to historic cities, management tools that they were obligated to have when they were inscribed on the World Heritage list.” For Mexico’s World Heritage cities, vast amounts of attention is devoted to developing cultural tourism for its financial benefits while ignoring the more noxious aspects that accompany it (Hiriart Pardo 2009, 37).

The author noted a decided similarity in actions in both Morelia and Guanajuato, in particular an improvement of the urban image through restoration of fountains and civil and religious architectural landmarks; cleaning of facades; burying of overhead cables; improvement of parks, streets, plazas, alleys, and sidewalks; placement of accent lighting on iconic structures; and implementation of equipment, signs, and other appurtenances to enhance the tourism experience in the cities’ centers. He found neither city “has identified proposals with academic support, with tools for holistic management that result in the design of indicators for evaluating in an integrated manner the impact that cultural tourism is having above all the development of the local population”<sup>4</sup> (ibid., 45).

In some places, visitor levels have reached tipping points where continued unrestricted access will compromise the sustainability of a World Heritage site. As noted previously, Chichén Itzá has turned into a “Disney-esque mecca” (Nadeau 2006).

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<sup>4</sup> My translation

Visitors no longer can climb to the top of the famous Pyramid of Kukulcan at the Mayan World Heritage site Chichén Itzá (Noble 2008). Simultaneously, managers continue to reveal insensitivity to local communities and the need to preserve the cultural integrity of sites. Teotihuacán, Mexico's most-visited archaeological site, has installed a sound and light show, which has defaced its pyramids and other structures. Chichén Itzá has also made use of such technology. As crowds continue to increase and access becomes more limited, managers may increasingly reach for other, sometimes inappropriate, means of attracting new and repeat visitors.

Increased visitation may also push Mexico toward a model which has been described as a “vicious circle of tourism.” This phenomenon was described by Antonio Paolo Russo at Erasmus University of Rotterdam (Russo 2002, 165-182). Heritage cities will respond to congestion by limiting facilities in the central core. As facilities are pushed out, mass tourism creeps in. Visitors increasingly become day-trippers who stay in chain hotels, eat in chain restaurants, and experience only dim sensations of a World Heritage site or other cultural attraction.

Three of Mexico's most recent World Heritage sites—the Monarch Butterfly Biosphere Reserve, and the Protective town of San Miguel and the Sanctuary of Jesús Nazareno de Atotonilco—are located in the country's Central Highlands. Mexico is cognizant of the synergies available from having concentrations along tourist routes.

Mexico's most recent addition to the World Heritage list, San Miguel de Allende, has a large expatriate population that contributes financially to local cultural heritage institutions. It is possible that Mexico may increasingly turn to foreign capital as a resource to preserve cultural heritage. The cynic may foresee a trend toward increased

promotion of locations with or near large expatriate populations as cultural heritage or World Heritage sites.

Likewise, if San Miguel de Allende is any model for future trends, one can expect increased pressure for high-end, large-scale real estate development. An addition to Mexico's latest World Heritage city that cannot be overlooked is the 27-unit Artesana Rosewood community on the eastern edge of its central core. Units at this development, occupying the last remaining large site in the San Miguel's historic center, will range from under \$1 million to \$3 million (Atkinson 2008). Its website describes Artesana Rosewood as intended "for those who appreciate authentic living, who value the arts, and who crave exciting experiences every day, Artesana offers an array of community activities and exclusive amenities for homeowners." According to the website, its features include "an array of indulgent services and treatments" (Artesana Rosewood).

With its maturing beach resorts and increased competition from other locations in Central America and the Caribbean (including Cuba), one can expect Mexico to continue to expand its heritage tourism offerings. The question remains whether the country will be able to resist the financial allure of a development path which may ultimately compromise the integrity of cultural resources and cut off residents from their own heritage.

## CHAPTER 3 RESEARCH METHODS

### **Overview**

A review of relevant literature highlights the widespread belief that inscription in the World Heritage list results in increased economic activity resulting from tourism. At the same time, present literature lacks any rigorously derived evidence proof that such a relationship exists.

This analysis had two goals: (1) to test, measure, and articulate any relationship between inscription and international tourism; and (2) using interviews with key stakeholders, field observations, and examination of reports, planning documents, and research papers, identify events and behaviors that may influence the trends in visitation in two specific cases: Guanajuato and Morelia. (A map showing the general location of these two cities appears on Figure 3-1.)

The two cases represented two contrasting situations in order to identify issues and behaviors that may contribute to different outcomes. These results were married in a synthesis of results. Such mixed-methods analysis strategies combine quantitative and qualitative techniques into a single study. Multiple approaches can be used to verify information that may be generated by one technique. Triangulation between different methods and data sources can produce a richer analysis, which can also avoid criticism that pertains to reliance on any one particular method.

This chapter will review existing literature pertaining to the research, and describe the methods employed by the two central components of the analysis: a) a statistical analysis and b) an examination of two case studies within the context of information obtained from the statistical analysis. As both components are intrinsically different, they

will be discussed independently. This chapter will also provide background information on the subject of the study, Mexico, and the two World Heritage cities investigated as case studies: Guanajuato and Morelia.

### **Statistical Analysis**

This analysis used statistical models to explore the relationship between World Heritage inscription and foreign tourists to seven World Heritage cities in Mexico. Models isolated independent effects of these variables, controlling for other exogenous variables: the relative strength of the Mexican peso, the number of available hotel rooms in a given city, and overall trends in international tourism.

Statistical techniques, such as multiple regression, have often been used to establish relationships between variables over time, while controlling for other variables. However, evidence from published studies suggests this approach appears to have been little used for analyzing tourist trends. One analysis used similar econometric techniques to determine the effects of redesignating National Monuments in the United States as National Parks (Weiler and Seidl 2003, 245). Based on a set of eight National Monuments which were converted to National Parks between 1980 and 2000, the analysis suggested the change in designation resulted in 11,642 additional annual visitors for any given site. It subsequently used input-output models to calculate the economic impact of these visitors.

Simply stated, with typical statistical analyses, a hypothesis is defined, models are defined and tests are performed to determine the validity of a hypothesis under a given significance level. The power of the test can be increased in two ways: by increasing the number of observations in a sample or by raising the significance level of the test (Beals 1972). Exploratory analysis can be used in situations where well-defined hypotheses or

models are unavailable. Writing on the subject of exploratory analysis with regression, William F. Massy notes: “it is often necessary to use a preliminary sample of data to suggest interpretations that may be put to the test in later studies. This is the problem of exploratory, as opposed to descriptive cause-effect research. . . .” (1965, 234). It has been argued that when statistics are used to explore data, inferential procedures and hypothesis testing may be inappropriate (Tabachnick and Fidell 1989). Within this context, it could be argued that the current analysis, whereby an iterative process is used to attempt to understand data interactions, can be described best as exploratory. While the research is governed by a generalized hypothesis that inscription on the World Heritage list positively affects the number of international visitors to World Heritage cities, there is no clear notion of *when* that impact will befall any given World Heritage city. Does it occur immediately? How many years does it take for a significant impact to occur? How long does the effect last? A probe of such questions might arguably be termed “data analysis” rather than statistical analysis (Berndt, Morrison, and Rosenblum 1992, 1).

### **Specifying the Model & Choosing the Variables**

The broad goal of the statistical analysis was to understand the effect of inscription on the World Heritage list for tourism in these cities. Multivariate regression models provide a mechanism for determining how “a given dependent variable is affected simultaneously by several independent variables” (Babbie 1998). The influence of each independent variable is weighted by its coefficient, which expresses its independent impact on the dependent variable, all other variables held constant.

Time-series analysis answers the question: “To what extent can I predict the present from the past” (Gottman 1981)? A time series is notable because “its

observations have some form of dependence on time” (Wonnacott and Wonnacott 1972). While time-series analysis may seem straightforward, it is complicated by the fact that observations are not independent of one another, potentially resulting in a condition known as “autocorrelation.” Wonnacott and Wonnacott observe, “Autocorrelation means that successive observations are dependent to some extent; thus, with positive autocorrelation, the second (or some later) observations tends to resemble, or repeat, the first observation hence gives little new information.” Autocorrelation causes models to provide less information about trends than would otherwise be available.

A model where a previous period’s data affects an estimate of a coefficient in the present period is called a “first-order autoregressive model” (Franses 1998). Mixed models, such as Proc Mixed, available from SAS are capable of isolating the autocorrelation, thus enabling one to generalize with more confidence from the effect of included variables.

As a general rule for model specification, one should include as few variables as possible (Tabachnick and Fidell 1989). Layering on more and more variables may create a better solution, but marginally so, and it is possible to have a situation with a large number of variables relative to sample size.

On the other hand, models with small sample sizes can produce coefficients that are not significant, but adding observations makes it easier to detect relationships. Indeed, with very large samples, statistically significant coefficients can be detected even if the coefficient is quite small (Lewis Beck 1980).

In the case of the current analysis, with four independent variables and twenty-three data points extending only from 1986 to 2008, that is a real danger. Tabachnick and Fidell noted that the bare minimum requirement is to “have at least five times more cases than independent variables” (Tabachnik and Fidell 1989). A review of one hundred international tourism demand models (Lim 1997, 835) found the number of observations ranged from a low of five to a high of twenty-eight, with a median and mean of sixteen. The study notes the difficulty of achieving meaningful regression estimates with small samples. Within the context of the current study, the twenty-three years’ worth of data, while a small sample, provides more than is typical for models of international travel demand.

What exogenous variables are typically used in travel demand models? The same paper (ibid.), after reviewing 100 models, provided the following general specification for the typical model:

$$DT_{ij}=f(Y_j, TC_{ij}, RP_{ij}, ER_{ij}, QF_i), \quad (3-1)$$

where

$DT_{ij}$ =demand for international travel services by origin  $j$  for destination  $i$ ;

$Y_j$ =income of origin  $j$ ;

$TC_{ij}$ =transportation cost between destination  $i$  and origin  $j$ ;

$RP_{ij}$ =relative prices (i.e., the ratio of prices in destination  $i$  and origin  $j$ );

$ER_{ij}$ =currency exchange rate, measured as units of destination  $i$ 's currency per unit of origin  $j$ 's currency;

$QF_i$ =qualitative factors in destination  $i$ .

It should be noted that the review found a range of explanatory variables in models, from one to nine, with a mean of 4.27 and a median of four. An obvious characteristic of the

typical model, noted above, is specificity regarding origin, destination, or both origin and destination. From a theoretical standpoint, if one can model travel from individual origins to a given destination, one could also model travel from all origins to a given destination—either by summing the individual results or computing the model using higher-level data, and, most likely, achieving a less precise result.

The immediate goal of the statistical analysis was to determine the extent to which a city's inscription on the World Heritage list (in this case, an independent variable) influences the number of visits to World Heritage cities (the dependent variable). The specified model was derived using regression analysis of time-series data, a procedure that can help to identify the independent drivers of a dependent variable, permit assessment of the influence of these drivers, and “both explain the past and predict future behavior of variables of interest” (Ostrom 1978). World Heritage inscription cannot be the sole influence on tourist behavior. While visitors may be influenced by the status conferred by the World Heritage list, their motivations are also driven by numerous other forces. The independent variables used in the models should express an array of obvious drivers of international tourism. One leading work on the subject of multivariate statistics notes that, as a general rule, models should use “a small number of cheaply obtained, easily available, unrelated variables”(Tabachnick and Fidell 1989).

We saw earlier that a review of 100 travel demand models concluded that most specify general travel demand as a function of income, transportation cost, relative price of a destination, currency exchange rates, and qualitative factors at the destination site (Lim 1997, 835). In practice, lack of valid data has been a barrier to meaningful analysis of the relationship between World Heritage list inscription and tourism (Buckley 2004,

71-73). While identified relationships arguably could be stronger with more precise data, in the real world one frequently has to either find proxies for data or perform no analysis whatsoever. A quote from a former US Secretary of Defense comes to mind: "You go to war with the army you have, not the army you might want or wish to have at a later time" (Schmitt 2004).

Fortunately, Mexico maintains a comprehensive bank of tourist arrival and hotel occupancy data. The country's Secretaría de Turismo (SECTUR) collects data for seventy-eight Mexican tourist destinations, including cities, towns, and archaeological sites, including nine of Mexico's ten World Heritage cities. As most Mexican World Heritage cities were inscribed prior to 1992, the data, reaching back to 1986, provide only a handful of data points prior to joining the World Heritage list. The first Mexican cities added to the List—Oaxaca, Puebla, and Guanajuato—have more limited data on pre-inscription visitors and rooms. Available data for international arrivals at Mexican World Heritage Cities are reproduced in Appendix A.

Since this analysis was initiated, Mexican tourism data for 2009 have become available. The combined effects on tourism of economic recession, the H1N1 influenza outbreak, and perceived dangers from drug-related violence suggest results for that year would contribute little to understanding long-term trends. A SECTUR report, containing data from numerous sources, indicates the number of foreign visitors to Mexico arriving by air declined by from 14.2 million to 12.3 million between 2008 and 2009—a 13.6% decline (Estados Unidos Mexicanos, Secretario de Turismo [SECTUR] 2010, 1-2-17).

SECTUR collects and publishes data reflecting tourist arrivals for Mexican nationals (*nacionales*), foreigners (*extranjeros*), and total arrivals. As data are derived from information collected at hotels, motels, and cabins (*cabañas*) during registration, (Estados Unidos de México, Secretaría de Turismo 2008) figures for domestic tourists, many of whom may stay with relatives or friends, would tend to be less than accurate.

Further, while foreign visitors to cities known largely for their cultural heritage are likely to be visiting as a response to their cultural attractions and heritage, domestic visitors would tend to have a greater array of motives for overnight stays, including family visits, work assignments, sports events, training, and medical care.

That is not to say that any of these reasons would not apply to foreign tourists. Mexico's World Heritage cities have expatriate populations of various sizes, and would attract visits from friends and family. San Miguel de Allende represents an extreme case of foreign residents occupying a Mexican World Heritage city. One account notes: "According to Christopher Finkelstein, secretary of the San Miguel City Council, 12,000 to 14,000 of the city's population of 80,000 are expatriates, roughly 70% of them from the United States" (Travel and Leisure 2007). As noted, the lack of post-inscription tourism data for that city precludes modeling in that case, and the other Mexican World Heritage cities in the sample without doubt all have smaller proportions of foreign residents. Other World Heritage cities may attract foreign visitors to Spanish-language schools, and occasionally to relatively inexpensive medical treatments. Such visitors, however, are unlikely to appear in significant numbers. Furthermore, longer-term visitors, such as students, tend to seek less-expensive housing at hostels or guest houses.

Figure 3-2 graphically portrays the 1986-2008 trend in foreign visitors for the seven cities covered in this investigation. The exhibit highlights the disparity between the two most frequented destinations—Puebla and Oaxaca—and the other five World Heritage cities.

Puebla is a large industrial city only 140 kilometers east of Mexico City, which presently includes the only operating Volkswagen® assembly plant in North America. The German automobile manufacturer is opening a new assembly plant in Chattanooga in 2011. Coincidentally, it recently announced construction of a new engine plant to be located in Silao, twenty-nine kilometers (eighteen miles) from Guanajuato, midway between Guanajuato and Aeropuerto del Bajío. Puebla's proximity to the capital (approximately two hours by bus) plus the large number of international business travelers arriving there help drive the large discrepancy between it and most Mexican World Heritage cities. Oaxaca also is a large industrial city. A highway completed in 1994 reduced travel time to the country's capital from nine hours to five hours. Improved access helped increase the city of Oaxaca's influence in the region—its share of the state of Oaxaca's economy reportedly increased from 10% to about one-third (Spider in the web: All roads lead to Mexico City 2006). As a tourist city, Oaxaca is perhaps uniquely positioned as a destination that simultaneously features art, distinct local cooking traditions, a well-preserved center dating back to the viceroyalty, and proximity to outstanding Pre-Columbian sites (National Geographic Traveler, 2009). The city of Oaxaca is twinned with the ancient Zapotec capital, a few kilometers to the west (Noble 2008) to comprise the inscription for the Historic Center of Oaxaca and Archaeological

Site of Monte Albán. Another well-known Zapotec site, Mitla, is forty-six kilometers (twenty-nine miles) from Oaxaca.

The seven lines depicted on Figure 3-2 are all vaguely linear, at least until 2000, after which substantially more variation among cities occurs. The graph indicates Puebla and Oaxaca experienced far more foreign visitors than the other five cities. Between 1995 and 2005 the two cities accounted for over 60% of foreign visitors to the seven World Heritage cities considered here. Further, Oaxaca and Puebla also demonstrated far more variability than was demonstrated by the other five cities. (The standard deviations of foreign arrivals to Oaxaca and Puebla between 1986 and 2008 were 36.7 and 74.1, respectively.) There are multiple explanations for this. Both Oaxaca and Puebla are large industrial cities. Fluctuations in foreign visitor totals reported there may to a large extent relate to non-tourist economic activity pertaining to manufacturing and commerce, rather than visitors attracted to cultural heritage. Additionally, parts of Mexico near Oaxaca have been subject to political turmoil, which may have periodically dampened visitor interest in the region, depending on the level and intensity of bad publicity.

The lack of consistency and variation in foreign visitor arrivals can be highlighted by a few examples, which are depicted in Figure 3-3. Between 2000 and 2001, two cities—Guanajuato and Oaxaca—experienced declines in foreign tourist arrivals of 40.2% and 7.5%, respectively. Querétaro experienced a negligible decline (0.5%) during that same period. Between 2001 and 2002, foreign visitor declines to Guanajuato and Querétaro were reversed, while foreign visitors to Oaxaca declined another 13.9%. In addition to Oaxaca, Zacatecas also experienced a decline in foreign arrivals (8.0%)

between 2001 and 2002. Between 2002 and 2003, all seven cities considered in this investigation experienced increased foreign arrivals. Referring again to Figure 3-3, note the nearly opposite trends in foreign tourist arrivals at Guanajuato and Morelia. Between 2000 and 2003, foreign arrivals to Guanajuato declined 52.2%, while foreign arrivals to Morelia increased by 51.9%.

Figure 3-4 depicts total combined annual arrivals for the seven cities. Viewed in aggregate, 1986-2008 combined international visitors to these seven Mexican World Heritage cities can be broken into two distinct trends: 1) a steady progression upward from 1986 to 2000, with a strongly positive (+92.3) correlation coefficient between annual international visitors and the advance of time, and 2) a downward trend between 2001 and 2008, with a weak correlation coefficient (-39.9) between international visitors and time.

One explanation for these trends is the impact of terrorist attacks on the United States on September 11, 2001, and subsequent effects on the economy, especially the tourism sector. However, the data indicate all Mexican World Heritage cities did not experience declines subsequent to 9/11.

The wide range of outcomes between 2000 and 2008 for the seven Mexican World Heritage cities in this analysis is highlighted in Figure 3-5, which shows the percentage change in international visitors between 2000 and 2008 for the seven Mexican World Heritage cities. Apart from Campeche, which following its inscription in December 1999 experienced eight years with virtually no net change in international visitors (declining 0.4%), half of the remaining six cities demonstrated large increases, with Querétaro, Zacatecas, and Morelia demonstrating increases of 125.4, 65.4, and 25.6%,

respectively. Simultaneously, international visitor levels decreased 43.2, 19.9, and 19.7%, respectively at Guanajuato, Puebla, and Oaxaca, respectively.

The aggregate negative trend between 2000 and 2008 attributes mightily to a net decline of more than 64,332 international arrivals to Oaxaca and Puebla during the period, which vastly overshadows the net increase of 34,024 international visitors to Campeche, Guanajuato Morelia, Querétaro, and Zacatecas.

With regression analysis it is possible to specify categorical or *dummy* variables that can introduce “information contained in variables that are not conventionally measured on a numerical scale, e.g., race, sex region, occupation, etc” (Suits 1957, 548). For this analysis, inscription status—that is, whether or not a city has been inscribed on the World Heritage list—was operationalized by transforming it into a dummy variable.

Dates of inscription are available from the website of UNESCO’s World Heritage Center (UNESCO, World Heritage Center b). The value of this variable was initially set at zero for years prior to inscription and one for the year of inscription and beyond.

Three other independent variables captured various other forces driving foreign tourist visits to each World Heritage city. Tourists obviously avoid destinations without a suitable supply of rooms. From a purely logistical standpoint, a lack of rooms would restrict visitors to day trippers. Beyond that, the law of supply and demand would suggest that a large supply of rooms relative to demand could lead to reduced rates and a corresponding increased demand. The SECTUR data include figures describing average available rooms per year, and these statistics were used to create a second

independent variable, which represents available tourist facilities. Figure 3-6 highlights the average number of rooms per year for seven Mexican World Heritage cities.

A number of aspects are highlighted by this graph. Hotel and motel rooms are not particularly fungible. When new business is stimulated, new capacity has to be financed, designed, and built. Likewise, when tourists abandon a destination, hotels do not immediately shut down. Consequently, numbers for available rooms tends to vary less than those for arriving visitors. That is not to say that the hotel industry does not respond to market trends. Figure 3-6 does suggest there were increases evident after the 1994 devaluation-induced spike in tourism. It also appears to suggest modest shrinkage in the number of available rooms after 2001.

Another driver of international tourism is price. The literature cites numerous approaches to this variable, including inflation rates, exchange rates, and the cost of transportation. The literature notes multicollinearity problems with using both inflation and exchange rates as both figures reflect the overall stability of a country's economy (Crouch 1994, 12). Exchange rates alone could provide a reasonable measure, however, as the dependent variable here includes *all* foreign visitors to a given Mexican World Heritage city, it would be difficult to establish a blended exchange rate for all countries sending visitors to Mexico.

The relative value of the Mexican peso, however, can be easily defined by relying on historical data for the number of pesos per Special Drawing Right (SDR). SDRs are the unit of account of the International Monetary Fund (IMF) and other international agencies and represent a basket of securities. Presently it includes the euro, Japanese yen, pound sterling and US dollar (International Monetary Fund 2009). Historical data

are available for the entire study period (1986 to 2008) using the IMF's International Financial Statistics (IFS) database. The analysis used values for the last available day during each of these twenty-three years to create a third independent variable. These data appear graphically on Figure 3-7 and are also reproduced in Appendix B.

The graph bears out the Mexican government's policy of using the US dollar-Mexican peso exchange rate to help stabilize its economy prior to 1994. One analysis notes, "The Mexican government used the exchange rate as an anchor for economic policy, i.e., as a means to reduce inflation, encourage a disciplined fiscal policy, and thus provide a more predictable climate for foreign investors" (US General Accounting Office 1996). The same account notes that the failure of this system to properly cope with inflation by devaluing the peso or increasing interest rates, coupled with political turmoil, led to the currency's devaluation in 1994.

Tourism can be influenced by the availability of facilities, as defined by available hotel rooms, and by price, as defined by the relative strength of currency in the target country. The ability of these two independent variables to explain the dependent variable, international visitors by Mexican World Heritage city, is diminished to the extent that global trends in tourism are not held constant. The model accomplished this by including a variable for global international tourist arrivals, as reflected by data from the United Nations World Tourism Organization. This information is highlighted in Figure 3-8 below and is reproduced in Appendix C.

The most distinct feature of the graph is the 2001 interruption in the steady linear march of tourism increases during the previous fifteen years. (During that fifteen-year period the relationship between year and international arrivals is nearly linear, with a

correlation coefficient between year and arrivals of 0.998.) The subsequent decline and stagnancy until 2004 can be attributed to the attacks on September 11, 2001, and related impacts on the world economy, on the availability of flights, and on security. With Figure 3-4, we witness decidedly different trends for foreign arrivals to Mexico before and after 2001. On a global basis, the effect of 9/11 differs. After two years of modest growth or stagnancy in international arrivals, international arrivals increased at a generally higher rate than had been seen prior to 2001. The two dotted lines on Figure 3-8 highlight different trends before and after 2001. Apparently pent-up demand for trips that were deferred during the earlier part of the decade led to steeper annual increases over the period. The correlation coefficient of 0.982 (between international arrivals and year) also suggests strongly linear increases in foreign tourism for the 2002-2008 period.

The differences between trends in global international arrivals and international arrivals to Mexico are likely explained by the fact that foreign visitors to Mexico are predominantly from the United States and Canada, mature economies that also witnessed considerable economic stagnation during the first part of this decade. Global tourism statistics would also include visitors from Eastern European and Asian countries that experienced aggressive growth during the same period.

More recent events may have altered the suggested trends. WTO notes that international arrivals declined during the second half of 2008 because of problems due to “financial crisis, commodity and oil price rises, and sharp exchange rate fluctuations” (United Nations, World Tourism Organization 2009).

An advantage of specifying a variable with United Nations World Tourism Organization (WTO) data for global international arrivals is that it simultaneously reflects the impact of 9/11, but also controls for other trends, such as general trends in economic activity.

### **Data Handling**

The analysis method employed a similar process for each of seven World Heritage cities. Data for available hotel rooms, pesos per SDR, and international tourist arrivals were combined with the dummy variables denoting the date of inscription and whether or not the year in question is before or after 2001. Intuitively, one might expect World Heritage inscription to have a delayed effect on tourism. All things being equal, a city should not be inscribed on the list in one year and expect an immediate increase in foreign visitors. For all but the most well-known World Heritage cities, it takes time to increase public awareness, to improve access, and to provide facilities.

One method of handling delayed impact of independent variables on dependent variables is to lag the value of a single independent variable. In practice, the time lag is generally built into a single independent variable (Kress and Snyder 1994). For this analysis a slight variation on this method was used.

Using the available data, the values for hotel rooms in thousands (variable "x1"), pesos per SDR (variable "x2"), international tourist arrivals (variable "x3"), and the dummy variables for World Heritage list inscription (variable "d") were regressed against foreign visitors to each of the seven cities in thousands ("y"). This procedure was repeated with variable "d" assuming a value of one in years subsequent to World Heritage inscription until a p-value of less than .05 was found for this variable with coefficients for "d" also reflecting the appropriate directionality. Above a p-value of .05

one could not conclude the probability coefficient of that variable is significant at a 95% confidence interval. With time-series analyses, data corresponding to each year exhibited some dependency on data from the previous year. The analysis employed an autoregressive covariance structure of “lag 1.”

In the iterative process, the year of interest was advanced until statistically significant and directionally logical coefficients could be estimated. So, for example, a model was initially fit to Querétaro data with the “d” assigned a value of zero between 1986 and 1995 and one beginning in 1996, the year of inscription on the World Heritage list. (The Historic Monuments Zone of Querétaro was inscribed on the World Heritage list in December 1996.) The resulting p-value for the variable in that initial iteration was .36, in excess of the .05 cutoff. A second iteration assumed a value for “d” of zero through 1996 and produced a p-value for that variable of .04, suggesting there is a 96% probability that the coefficient for “d” is significantly different from zero. (A comprehensive discussion of results and findings follows in the next chapter.)

The general specification of the models can be summarized as follows:

$$y = a + b_1(x_1) + b_2(x_2) + b_3(d_1) + b_4(d_2) + e \quad (3-2)$$

### **Case Studies and Mixed Methods**

Case studies have been described as detailed explorations that “seek to understand the larger phenomenon through close examination of a specific case and therefore focus on the particular. Case studies are descriptive, holistic, heuristic, and inductive” (Rossman and Rallis 1998). Because they focus on particular cases, the logic of probabilities, which is more commonly associated with statistical approaches, cannot be extended in such cases. Rossman notes, however, that the logic of “reasoning by analogy allows the application of lessons learned in one case to another population or

set of circumstances.” The strength of case studies, she notes, “is their detail, their complexity, and their use of multiple sources to obtain multiple perspectives”(ibid.).

While some of the rigidity of other experimental and statistical methods is foregone with case studies, they permit the ability to understand more complex relationships. Indeed, strict reliance on more data-intensive methods may force narrowly limited results.

Robert K. Yin describes an array of five research methods: experiments, surveys, archival analyses, histories, and case studies (Yin 2003). He notes that the “how” and “why” questions addressed by case studies, histories, and experiments “deal with operational links needing to be traced over time, rather than mere frequencies or incidence” (ibid.). Histories, he observed, deal with the “dead past.” Case studies, on the other hand, may include “direct observation of the events being studied and interviews of the persons involved in the events.” Experiments involve controlled situations, in the laboratory or in the field that “may focus on one or two isolated variables.” As Yin explained, both experiments and case study methods can be used to understand the “how” or “why” something happened. One would have to assume that the less-structured approach of case studies would be more appropriate for exploratory situations, where the full ranges of possible drivers for an effect have not been identified or cannot be identified in advance of the research or, as Yin notes, when “the boundaries between phenomenon and context are not clearly evident.” While case studies can provide additional details absent from the strictly defined statistical analysis, they also can provide other benefits. Lyn Richards (2005) noted that case studies not only can provide illustrations of phenomena, but they also can provide a stimulus to

integration. That is, they can be a tool for organizing a seemingly diffuse subject into something tangible.

Still, case studies are hardly immune to criticism. Yin's popular work on the topic (ibid.) notes several traditional "prejudices" against case study research, including 1) lack of rigor, 2) enormous time requirements, and 3) difficulty in forming valid generalization. The first two criticisms can be addressed by careful procedures and management. With respect to the third criticism, Yin observed (15) that case studies, like experiments are generalizable to theoretical propositions and not to populations and universes. The goal is not to reduce a sample to conclusions, but to "expand and generalize theories."

The above discussion raises two important questions—one perhaps more statistical and another more practical: 1) Is a statistically significant relationship between inscription on the World Heritage list and international tourism purely an accident related to the fact that six of the seven Mexican cities under scrutiny were put on the World Heritage list during the late 1980s and early 1990s, a period of relative prosperity which was generally characterized by large increases in travel and 2) All of these World Heritage cities operated in a similar environment with respect to the relative value of the Mexican peso, perceived insecurity about flying, and the global economic trends. What was it that caused international visitors to decline in some cities, after significant increases in foreign visitors attributable to World Heritage inscription, and increase in others?

To help answer both questions, the analysis focused on two Mexican World Heritage cities that demonstrated opposite trends in foreign tourist arrivals between 2000 and 2008.

As Yin observed, the case study is best suited for the “how” and “why” questions. In contrast, economic analysis is better suited to questions of “how many” and “how much.” A mixed-method approach involves using “methodological triangulation, the use of different methods to analyze a specific situation” (Gaber, American Planning Association, and Gaber 2007). Gaber further observed that such strategies can be further disaggregated into “within-method” and “between-method” triangulation. Multiple methods may be necessary to get insight into “multifaceted problems,” which may involve a “combination of substantive topics such as transportation, environment, and economics” (ibid.).

This extra dimension allows investigators “to address more complicated research questions and collect a richer and stronger array of evidence than can be accomplished by any single method alone” (Yin 2003).

In the context of an investigation of the relationship between World Heritage inscription and international visitors, a strictly quantitative approach could provide insights into a narrow spectrum of questions, such as the following:

- Is there a statistical relationship between inscription and the number of visitors?
- How many years did it take for inscription to have a statistically significant impact on the number of visitors?
- How many visitors came to the World Heritage city because it is on the World Heritage List?

For understanding the extent to which other events, policies, and trends can influence the number of visitors, a different method of inquiry—case study—becomes appropriate. A statistical approach would be appropriate for evaluating the more obvious and more universal influences of increased visits with reasonable and available data. To understand less obvious influences, which may be idiosyncratic to a given World Heritage city, a case study is indicated. The combination of a quantitative analysis and case study analysis into a mixed-methods approach enables a richer and more multi-dimensional exploration of the impact of World Heritage inscription than reliance on a single approach.

From 1986 (two years prior to the city's inscription) to 2000, international visitors to Guanajuato increased at a 7.9% compound average growth rate (CAGR). Going forward from 2000, the trend in international visitors to that city demonstrated a -6.8% CAGR between 2000 and 2008. Extending the window but one year, the 2000-2009 the CAGR becomes -12.4%, reflecting three major influences: the 2009 outbreak of H1N1, which originated in Mexico; the fullest effects of the worldwide recession, which began in 2008; and impact of increasing fear of drug-related violence.<sup>1</sup> Ignoring 2009's disaster for Mexican tourism, Guanajuato still experienced a 43.2% decline in reported international visitors between 2000 and 2008.

In contrast, Morelia (the "Historical Center of Morelia" using nomenclature of the World Heritage list), witnessed a more modest 82.6% increase in international arrivals between its inscription in 1991 and 2000. Beyond 2000, however, the trend was

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<sup>1</sup> The 2009 murder rate in the State of Guanajuato was 8.2 victims per hundred thousand residents. This is less Mexico's average of 14.4, and far less than the rates in Chihuahua, Durango, and Sinaloa: 74.4, 60.0, and 47.2 per hundred thousand, respectively. (México Evalúa 2010, 29) The state of Michoacán reported 18.4 homicides per hundred thousand residents—124.4% higher than Guanajuato.

altogether different. While Guanajuato saw international visitors drop 43.2% between 2000 and 2008, Morelia saw a 25.6% *increase* during the same period. In terms of annualized growth, Morelia saw a 2.9% compound annual growth rate between 2000 and 2008, in contrast to the -6.8% CAGR demonstrated by Guanajuato during the same period.

Guanajuato and Morelia remained on the World Heritage list through the entire 2000-2008 period. In both cities public and private efforts worked to both improve the appearance of the city and promote it to visitors. Both Guanajuato and Morelia, however, witnessed completely different trends in foreign visitor arrivals during this period. A qualitative investigation into differences in planning, public policy, and management can provide insight into the effect of different behaviors on a city's success in attracting international visitors. Sustainability pertains to the ultimate ability of a place to endure. While cultural tourism has the potential to threaten the long-run integrity of valuable sites, tourists and the cash flows they generate from taxes, museum admissions, etc., are the most prominent means of support for cultural resources.

Whatever the reason, this closer examination of foreign visitor arrival data for Mexican cities highlights different behavior for seven Mexican World Heritage cities during the study period. It would be imprecise to statistically model the influence of World Heritage inscription on foreign arrivals based on aggregate data, which would conceal differences among the cities. Investigating the seven World Heritage cities on an individual level may help to identify both commonalities and differences, which can then permit a focus on other variables which drive trends in visitors.

The investigation of inscription's effects in Guanajuato and Morelia amplified our understanding of the magnitude and timing of post-inscription tourism increases. It is common knowledge that inscription on the World Heritage list affects local communities and there is compelling evidence to suggest that tourism increases as a direct result of inscription, independent of other exogenous variables. However; the increase in tourism may be accompanied by other direct and indirect economic impacts. Four different types of effects have been identified as resulting from cultural heritage (César Herrero Prieto [2000], as cited in Hiriart Pardo, 2006):<sup>2</sup>

- direct economic effects: Job generation, added production value, entry fees, and other primary effects of increased visits
- induced economic effects: Increased activity from secondary activities, such as construction, transportation, electrical generation, etc.
- effects on the local economic base and urban planning: Added value of properties as a result of inscription and intensified protection
- quality-of-life effects owing to improved housing, facilities, infrastructure, and cultural offerings

The case study broadly concerned the first two classes of economic impacts identified, and through interviews and analysis of available data identified other impacts of inscription on the World Heritage list. The timing of these impacts was compared with the other data, discussed above, to identify any relationships between them.

It has been observed that there is a paucity of empirical research on public sector perspectives of World Heritage sites (Nicholas, Thapa, and Pennington-Gray 2009, 206). Through interviews with public officials and others involved with preservation and

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<sup>2</sup>My translation.

World Heritage, this analysis was able to examine and analyze public policy toward investment, promotion, and the related impact on preservation.

This particular case study will consider two cases: Guanajuato and Morelia. As such, it will attract additional criticism for potential bias. With only two cases, critics may argue that the lack of diversification can provide biased results. The choice of cases could also be criticized because of the lack of similarity or obvious differences between the two cities. The fact remains that Mexico's World Heritage cities differ in diverse ways. It is equally impossible to group cities either as twins or as opposites. Both Guanajuato and Morelia are within the central highlands of Mexico. Both have outstanding highway access to Mexico City and Guadalajara, the country's two largest cities. Both cities have similar air service to other cities in Mexico and to the United States by Aeromexico, US carriers, and Mexican low-fare operators. Guanajuato and Morelia share general similarities with respect to dates of inscription, status as state capitals, and neither experienced the above-average levels of foreign visitors as at Puebla and Oaxaca. The latter two World Heritage cities witnessed ten-year average foreign visitor levels that were 306% and 148% higher, respectively, than were experienced in the seven World Heritage cities examined here.

On the other hand, Guanajuato and Morelia differ in many ways:

- **Size:** Morelia is several times larger than Guanajuato. Its reported population in 2005 was 684,145 (Instituto Nacional para el Federalismo y el Desarrollo Municipal [INAFED]); Guanajuato's was 154,364. (Instituto Nacional para el Federalismo y el Desarrollo Municipal [INAFED], 21)
- **Economy:** Guanajuato's is far more dependent upon tourism.
- **Physical Aspects:** Morelia's historic center uses a grid pattern typical for cities settled by the Spanish. Guanajuato was built in a narrow ravine, with a far more linear layout.

An advantage of case study research is the ability to tap into multiple data sources (Yin 2003). The case study analysis of Guanajuato and Morelia relied on interviews, observation, and printed sources, such as newspapers and conference reports, to identify drivers of change in flows of international visitors to those cities which arose after inscription on the World Heritage list as well as to understand other ways World Heritage list inscription influenced those cities.

One curious statistical difference between the cities merits consideration as a focus of research: International arrival levels to Guanajuato dropped 40.2% between 2000 and 2001, and continued a general decline during the nine-year period. In aggregate, international arrivals to Guanajuato fell 43.2% during the period. During the same interval, international arrivals to Morelia *increased* by 91.2%.

Both World Heritage cities were subject to the same deleterious effects on tourism of the exploding dot-com bubble, the September 11, 2001 attacks and the subsequent insecurity about travel. Both cities would presumably become more attractive destinations through the decade as the value of the Mexican peso declined.

Site visits and semi-structured interviews were conducted with former and present government officers, preservationists, and other local experts in the field, such as those associated with local universities (Universidad de Guanajuato and La Universidad Michoacana de San Nicolás de Hidalgo, in Morelia), and NGOs, such as Guanajuato Patrimonio de la Humanidad.

The historical record was reviewed by examining various periodicals from Mexico and elsewhere. This included a review of existing research on the impact of inscription on Guanajuato, Morelia, and other Mexican World Heritage cities.

Finally, direct observation in Guanajuato, Morelia, and other World Heritage cities, such as San Miguel de Allende, Puebla, Zacatecas, and Mexico City, provided insights into the historic context, preservation status, and other aspects potentially influenced by inscription.

The semi-structured interviews were built from a framework of general questions:

- How has inscription affected the city? How does the city benefit from inscription? Are there any negative effects and what are they?
- What do you think about the designation?
- How has inscription affected tourism: volume, quality, length of stay, spending?
- What was the city like before inscription and how has it subsequently changed?
- More specifically, how does one explain the decrease in foreign arrivals between 2000 and 2008 in Guanajuato and the increase in foreign arrivals during that same interval in Morelia?

This general framework was augmented by specific questions tailored to the interviewees' experience. For example, those involved with tourism or travel were asked supplementary questions about changes in a given city's tourism promotion strategy. Public officials were asked to identify public policies with respect to development from the perspective of government, the private sector, or from public-private partnerships.

A preliminary list of contacts was developed and later expanded through "snowball sampling." For example, the initial inventory of people interviewed in Guanajuato included the following:

- Salvador Flores Fonseca, Councilman and Chairman of the Committee on Heritage Conservation for Guanajuato
- Jesús Antonio Borja, Director, Casa de la Cultura, Guanajuato
- Isauro Rionda Arreguín, Historian

- Eduardo Estévez Sandoval, Promotion Manager, Mexican National Association of World Heritage Cities (Asociación Nacional de Ciudades Mexicanas Patrimonio Mundial)
- Bertha Hernández Araujo, Director, Guanajuato Patrimonio de la Humanidad

### **Subject of Study**

Mexico (or, more formally, the United States of Mexico) has ten World Heritage Cities, including parts of the country's capital, which has three World Heritage sites within its borders<sup>3</sup> Mexico was a desirable subject for several reasons. By far, it has more World Heritage cities than any other country in the Western Hemisphere. Its ten World Heritage cities make it number three globally, after Italy, with sixteen, and Spain, with thirteen.

For comparison, Canada has two World Heritage cities, the Historic District of Old Québec and Old Town Lunenburg. The United States National Park Service oversees the World Heritage program in the United States. The US government's requirement of 100% property owners' consent has resulted in a situation whereby the United States has no World Heritage cities. In 2008, tourism was Mexico's third largest source of foreign exchange after oil exports and remittances by emigrants (Buchanan 2009). With the tourism sector's importance to its economy, the Mexican government maintains consistent data for many tourist destinations, including most World Heritage cities.

Mexico has twenty-nine World Heritage sites, of which thirteen apply to the cultural resources from the Pre-Hispanic period and during the Spanish rule—these are mostly archaeological sites. Examples include the Pre-Hispanic cities of Chichén Itzá, Uxmal, and Teotihuacán, and the five Franciscan missions of Sierra Gorda in Querétaro.

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<sup>3</sup> The Historic Center of Mexico City and Xochimilco, Luis Barragán House and Studio, and Central University City Campus of the *Universidad Nacional Autónoma de México* (UNAM).

Another ten are living cities with extensive histories, buildings, monuments, landscapes, and sites dating back to the viceroyalty and, in some cases, the Pre-Hispanic period. Another four are natural sites, including the Islands and Protected Sites of the Gulf of California and the Monarch Butterfly Reserve in Michoacán. Two others include buildings from the recent past in Mexico City: Luis Barragán House and Studio and the Central University City Campus of the Universidad Nacional Autónoma de Mexico (UNAM).

While it would be possible to analyze and compare all types of Mexican World Heritage sites, the resulting lack of homogeneity would confound meaningful conclusions. For example, many archaeological sites are remote. One might assume the additional time and expense required to reach them, coupled with a less-competitive array of hotels and restaurants, would result in a different relationship between inscription and tourism from urban settings. While it would be interesting to understand these differences, it is beyond the scope of this particular analysis.

Table 3-1 lists Mexico's ten World Heritage cities, three of which were excluded from this analysis. As San Miguel de Allende was inscribed in 2008, limited post-inscription data are available. (As of this writing, the most recent data available from SECTUR by way of Consejo de Promoción Turística are from 2009.) No data were available for the Historic Monuments Zone of Tlacotalpan because tourism data have not been kept for that site. Mexico City was excluded from the analysis because of its dominance of the country and 19.2 million people in its metropolitan area ( Secretaría de Desarrollo Social, Consejo Nacional de Población, and Instituto Nacional de Estadística, Geografía e Informática 2007, 34-35). This massive international city has

many attractions for international visitors, in addition to its history and culture. As the commercial heart of the world's eleventh-largest nation (Central Intelligence Agency 2010), Mexico City doubtless attracts its share of international business travelers. In such an environment, with a vast array of commercial, political, and political motivations for travel, ascribing visitor variation to World Heritage status would appear to be an intellectual stretch. The next largest Mexican World Heritage city in terms of population, Puebla (or, more accurately, the Puebla-Tlaxcala *zona metropolitana*), is about one-eighth the size of Mexico City, with 2.5 million residents (*ibid.*, 35). The estimated metropolitan and municipal population of Mexico's World Heritage cities is shown on Table 3-2. Campeche, Guanajuato, San Miguel de Allende, and little Tlalcotalpan, with 13,845 residents, are not part of a defined *zona metropolitana*, which confounds comparison. The median municipal population of the ten Mexican World Heritage cities is 252,000 inhabitants. There are other reasons for excluding Mexico City, apart from its size. Notably, the capital includes three different World Heritage sites. In addition to Historic Center of Mexico City and Xochimilco, inscribed in 1987, Mexico City also includes two more-recent additions to the World Heritage list: the Luis Barragán House and Studio, inscribed in 2004, and Central University City Campus of the Universidad Nacional Autónoma de Mexico (UNAM), inscribed in 2007. While the two more recent additions to the capital's inventory of World Heritage sites probably do not attract a fraction of the tourists visiting its historic center, the possibility of "noise" from their introduction compromises a comparison between Mexico City and the other, smaller World Heritage cities in Mexico, for it's possible that changes in recent years may, in measure, be due to addition of the new sites within Mexico City.

## **Historic Town of Guanajuato and Adjacent Mines**

Guanajuato lies within a 470 kilometer (282 mile) belt of Mexican World Heritage cities beginning west of Mexico City at Morelia and extending north to Zacatecas. Within this swath are five World Heritage cities—Morelia, Querétaro, San Miguel de Allende, Guanajuato, and Zacatecas—half of Mexico’s total, including Mexico City, which, as noted, itself contains three sites. As Table 3-2 indicates, Guanajuato is the fourth-smallest of the ten cities, with 150,471 inhabitants within its city limits in 2005. While it is smaller than most Mexican World Heritage cities, Guanajuato is closer to the ten cities’ median population of 252,000 than seven other cities. Guanajuato entered the World Heritage list in 1988, which provides more than twenty years of post-inscription information to examine.

One other important international tourist destination is in the state of Guanajuato. San Miguel de Allende, a historic town which has been and remains popular with visitors and expatriates from the United States and Canada, is ninety-seven kilometers (sixty miles) from the city of Guanajuato. Dolores Hidalgo, the birthplace of Mexican independence from Spain, is only fifty-three kilometers (thirty-three miles) north of Guanajuato. The latter is of obvious importance for Mexican nationals, but appears to merit less interest for most international visitors. The traveler consulting Michelin’s *Green Guide*, for example, would find no reference to this historically important city (Watkins 2008, 479).

Guanajuato, Mexico, was first settled by Europeans in the early sixteenth century and “in 1741 King Philip V granted the town the title of Most Noble and Loyal City of Santa Fe y Real de Minas de Guanajuato (Guanajuatocapital.com). The city’s development was enhanced by the proliferation of silver exploitation and by the end of

the eighteenth century saw its population reach 55,000 (Díaz Sánchez 2006).

Guanajuato prospered through the nineteenth century and benefited from the largesse of the thirty-five-year dictatorship of Porfirio Díaz in the later days of that century and beginning years of the twentieth century.

The allure of this city, jammed into a ravine, has enchanted visitors for more than a century. A description from 1908 could apply equally today: “Its winding little thoroughfares can hardly be called streets, except in the business part; they are mostly narrow paths, and in a few places it is possible even to reach across and touch the opposite wall. These little streets meander aimlessly up the mountains, playing hide and seek with one another and giving at every turn the most exquisite bits for the brush of an artist” (Myers 1908).

In addition to its commercial role, Guanajuato is of profound historical importance as the site of the first skirmish in Mexico’s struggle for independence on September 28, 1810, when a group of insurgents led by Miguel Hidalgo y Costilla, Ignacio Allende, and Juan Aldama laid siege to a contingent of Spanish troops quartered in a former granary, known as the *Alhóndiga*. Royal Spanish forces led by Felix Maria Calleja subsequently killed the main proponents on January 16, 1811, in Guadalajara. Nearly ten months later, the heads of the aforementioned leaders (along with that of Mariano Jimenez) were hung on the four corners of the Alhóndiga, where they remained for ten years (Rionda Arreguin 1998).

Today Guanajuato is home to the government of the State of Guanajuato and the head campus of its 30,774-student university (Universidad de Guanajuato). Guanajuato hosts numerous festivals every year. Most famous is its autumn Cervantino Festival

which typically consumes the latter part of October. The city also hosts an international short film festival every summer.

The Historic Town of Guanajuato and Adjacent Mines were inscribed on the World Heritage list on December 12, 1988, on the basis of Criteria I, II, IV and VI. The ICOMOS nomination cites the city's layout, which is atypical for Spanish towns dating to the viceroyalty of New Spain (International Council of Monuments and Sites 1988, 39-40). The core of the city is in a ravine, which cannot accommodate the usual city plan dictated by Spain's Law of the Indies. The nomination also cites the city's "picturesque 'subterranean' streets, its plazas, and the construction of hospitals, churches, convents and palaces [which] are all inextricably linked to the industrial history of the region which, with the decline of the Potosi mines in the 18th century, became the world's leading silver extraction center" (ibid.). A tourist map of the city is reproduced in Figure 3-9.

Under Criterion I (masterpieces), the nomination notes that "Guanajuato possesses several of the most beautiful examples of Baroque architecture in the New World." It also refers to the technological marvel achieved in constructing Boca del Infierno mine shaft, which is 600 meters deep and 12 meters wide.

With respect to Criterion II (values/influences), UNESCO notes the Guanajuato's influence in mining towns of northern Mexico from the sixteenth through eighteenth centuries.

Under Criterion IV (typology), the nomination cites Guanajuato as an "outstanding example of an architectural ensemble that incorporates the industrial and economic

aspects of a mining operation.” The nomination notes the close economic linkage between churches, palaces, houses, and the industrial might of Guanajuato’s mines.

As for Criterion VI (associations), the nomination form simply states that Guanajuato is “directly and tangibly associated with world economic history, particularly that of the 18th century.”

The city has many other important associations, including the previously mentioned struggle for Mexican independence. Guanajuato also was the birthplace and childhood home of muralist Diego Rivera. His house now accommodates a museum including many of the artist’s paintings, drawings, and furniture. The museum is expanding to include adjacent buildings.

Guanajuato generally receives good press from tourist publications in the United States. *National Geographic Traveler* rated World Heritage sites in its November/December, 2006 issue, and Guanajuato merited a 79 score, which ranked it number four among all World Heritage sites and among a group of eight cities characterized by “top-notch condition, management, outlook, and local support: a great travel experience” (Tourtellot 2006, 114). The ratings were derived from a survey of 419 experts in sustainable tourism and destination stewardship who rated 49 of the then 830 World Heritage sites. Panelists’ comments showed the appeal of a city that is true to its roots without an abundance of concessions to modernity or tourist hordes: “Historic gem of central Mexico, this ‘charming, peaceful, welcoming city’ of colonial architecture and steep, narrow streets has jumped 11 points since 2004, due to care such as ‘repaving in traditional style, culturally and historically interesting, lots of events, good museums, not too many gringos” (ibid.).

A 2006 article from the *New York Times* (Cohan 2006) likewise betrays an enchantment with Guanajuato. As with the *National Geographic Traveler* article, the *Times* article pays tribute to the authenticity of experience in Guanajuato and notes a three-year, \$55 million initiative begun in 2004 to restore buildings and improve transportation. Unlike the *Traveler* article, which applauds efforts to restore pavement that it characterizes as being in traditional style, the *Times* notes successful community opposition to a municipal effort to repave the Plaza de San Fernando in a similar style, thwarting a much-loved traditional paving (Cohan 2006). The reality is that most of the dark gray paving stones within the center of the historic district have been replaced with rose-colored stones arrayed in a style more characteristic of European craftsmanship than that of central Mexico (National Geographic Traveler).

### **Historic Center of Morelia**

As Table 3-2 indicates, Morelia is one of the largest of Mexico's World Heritage cities, with a population of 684,145, as of 2005. The city lies squarely in the path of a major route between Mexico City and the country's second-largest city, Guadalajara. Morelia has been described as "the epicenter of one of Mexico's richest regions for its natural beauty and cultural manifestations" (Cabrales Barajas 2005, 35-36).

The nearby indigenous lakeside city of Pátzcuaro, some fifty-nine kilometers (thirty-seven miles) from Morelia, intends to join the World Heritage list (*ibid.*), although it is not on UNESCO's Tentative List, the organization's on-deck circle for World Heritage candidates (UNESCO, World Heritage Center b). Morelia also is roughly one hundred miles from the Monarch Butterfly Biosphere Reserve. The winter home for these beautiful insects was inscribed on the World Heritage list in 2008 under Criterion VII as a "superlative natural phenomenon or natural beauty" (UNESCO 2008, 1-2).

Unlike the State of Guanajuato, which sits squarely in the Mexico's Central Highlands, Michoacán extends to the Pacific coast, which is 310 kilometers (193 miles) from Morelia.

Morelia was founded in 1545 as the third European settlement in what has become Mexico's western state of Michoacán. A Spanish royal mandate dating to 1537 specified establishment of a city named for Valladolid. Europeans already living in the vicinity resisted efforts to establish a city in one of two obvious sites, the established settlements of Pátzcuaro and Tzintzuntzan.

The viceroy complied with resident's wishes and the city of Valladolid was located at the site of a relatively indigenous settlement called Guayangareo (Aguilera Garibay et al. 1999). The original place name translates from the indigenous language to "flat and long hill." The site's natural advantages included defensibility and adequate access to water with minimal risk of flooding (ibid.).

In 1828, Valladolid was renamed in honor of one its native sons and a leader in the struggle for Mexican independence, José Maria Morelos (International Council of Monuments and Sites 1990, 13-14). Another Mexican city named Valladolid survives in the southeastern Mexican state of Yucatán.

While Guanajuato was built into a narrow ravine, which largely prevented imposition of the traditional Spanish grid plan on the city, Morelia's design is largely based on small rectangular blocks (Ríos Szalay 1998). A tourist map of Morelia is reproduced in Figure 3-10.

The Historic Center of Morelia was inscribed on the World Heritage list in December 1991, under criteria II, IV, and VI (UNESCO, Convention Concerning the

Protection of the World Cultural and Natural Heritage 1991). Under Criterion II, which pertains to sites that “exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design” (ibid., 1), Morelia is credited as having an “original model of urban development of the sixteenth century...combining urbanism of Renaissance Spain with the “experience of Mesoamerica” (ANCMPPM, 1). Criterion IV addresses outstanding examples “of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history” (ibid., 1). According the Asociación Nacional de Ciudades Mexicanas Patrimonio Mundial, “The city of Morelia has outstanding examples of different styles” with the spirit of medieval harmony and elements of the Renaissance. “The rectilinear layout is aligned in such a manner as to avoid rigidity”<sup>4</sup> (ANCMPPM, 1).

Criterion VI considers references to “events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance.” In this regard, Morelia is cited as the birthplace of important personalities in Mexico’s history, notably Morelos (ibid.).

It should be noted that Guanajuato (unlike Morelia) achieved inscription under the perhaps most exclusive category, Criterion I (to represent a masterpiece of human creative genius). The ICOMOS recommendation observed, “Guanajuato possesses several of the most beautiful examples of Baroque architecture in the New World. The churches of La Compania (1745-1765) and above all La Valenciana (1765-1788) are

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<sup>4</sup> My translation.

masterpieces of the Mexican Churriguersque style” (International Council of Monuments and Sites 1988, 39-40). ICOMOS also made note of “unique artistic achievements,” such as a mineshaft that is twelve meters wide and 600 meters deep.

Morelia did not make it onto the 2006 *National Geographic Traveler* inventory of thirty-seven top World Heritage sites. Although Morelia merits inclusion in the World Heritage list as one of the “best of the best,” Michelin accorded it only two out of three stars, or “recommended,” in contrast to Guanajuato, which merited three stars, or “highly recommended.” Morelia’s much smaller neighbor Pátzcuaro, which is not on the World Heritage list (although some websites indicate it is), merited four stars (Watkins 2008, 479).

Table 3-3 shows foreign annual foreign arrivals to Guanajuato and Morelia between 2000 and 2008. Table 3-3 highlights a curious trend. Between 2000 and 2008, international visitors to Guanajuato declined 43.2%, while international visitors to Morelia increased at 25.6%. The explanations for these divergent trends will be probed in subsequent chapters.

Table 3-1. Mexican World Heritage cities by year of inscription

Year	Name
1987	Historic Center of Mexico City and Xochimilco
1987	Historic Center of Oaxaca and Archaeological Site of Monte Albán
1987	Historic Center of Puebla
1988	Historic Town of Guanajuato and Adjacent Mines
1991	Historic Center of Morelia
1993	Historic Center of Zacatecas
1996	Historic Monuments Zone of Querétaro
1998	Historic Monuments zone of Tlacotalpan
1999	Historic Fortified Town of Campeche
2008	Protective Town of San Miguel and the Sanctuary of Jesús Nazareno de Atotonilco

Source: World Heritage Center.

Table 3-2. 2005 population for Mexican World Heritage cities

Population (000)		
City	Municipal	Metropolitan
Campeche	238.9	N/A
Guanajuato	153.4	N/A
Mexico City	8,720.9	19,239.9
Morelia	684.1	735.6
Oaxaca	265.0	543.7
Puebla	1,485.9	2,470.2
Querétaro	734.1	950.8
San Miguel de Allende	139.3	N/A
Tlacotalpan	13.8	N/A
Zacatecas	132.0	261.4

Source: INEGI, for dates noted.

Table 3-3. Foreign arrivals to Guanajuato and Morelia: 2000-2008

Year	Guanajuato	Morelia
2000	62,536	28,843
2001	37,406	29,821
2002	41,866	37,364
2003	29,878	43,815
2004	30,697	52,277
2005	36,478	50,248
2006	34,858	49,613
2007	32,670	51,478
2008	35,520	55,143
Change: 2000-2008	(43.2%)	25.6%

Source: SECTUR, for dates noted.



Figure 3-1. General location of Guanajuato and Morelia, Mexico. (Source: Universidad Nacional Autónoma de México, Instituto de Astronomía.)

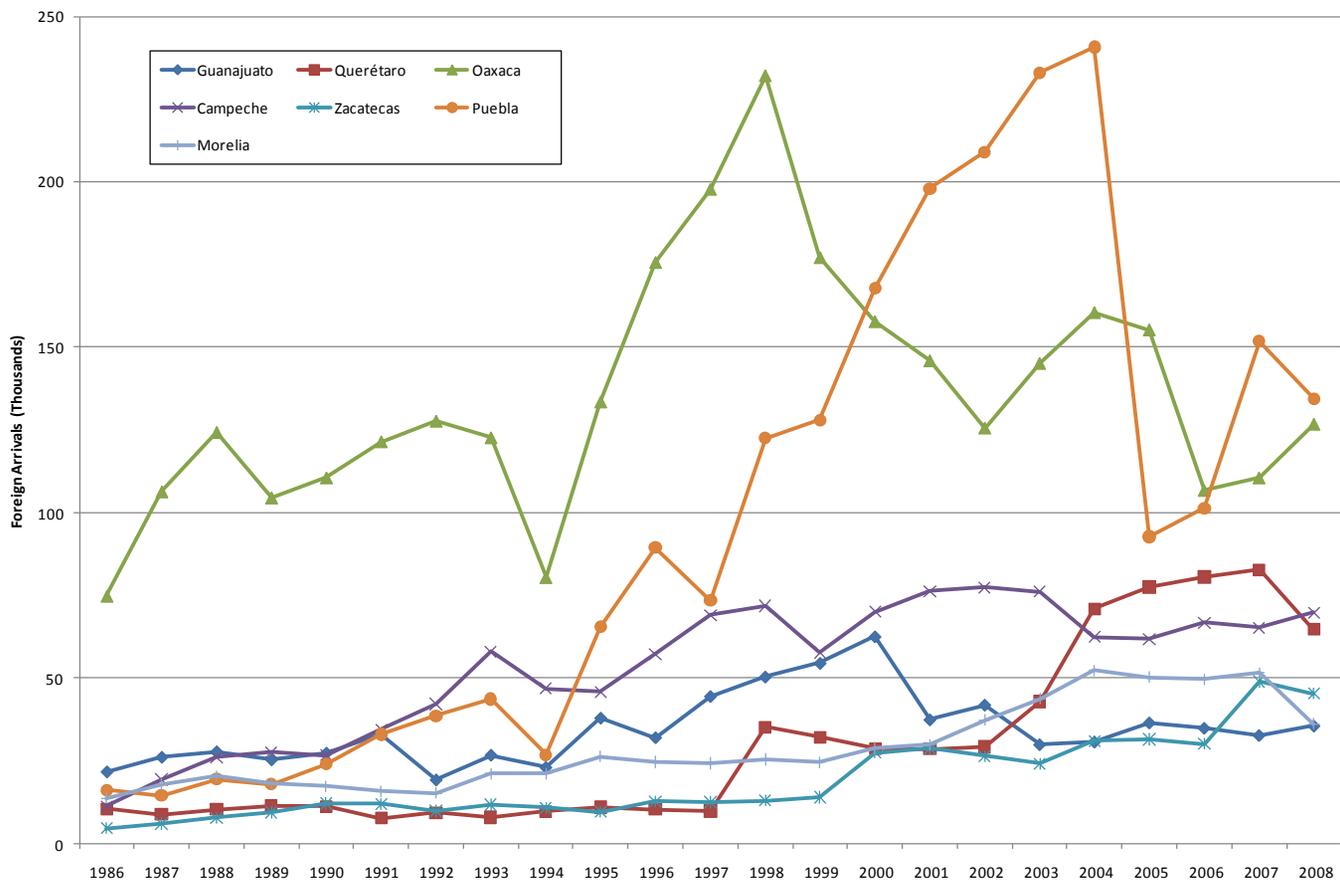


Figure 3-2. Foreign arrivals to Mexican World Heritage cities: 1986-2008. (Source: SECTUR, for dates noted.)

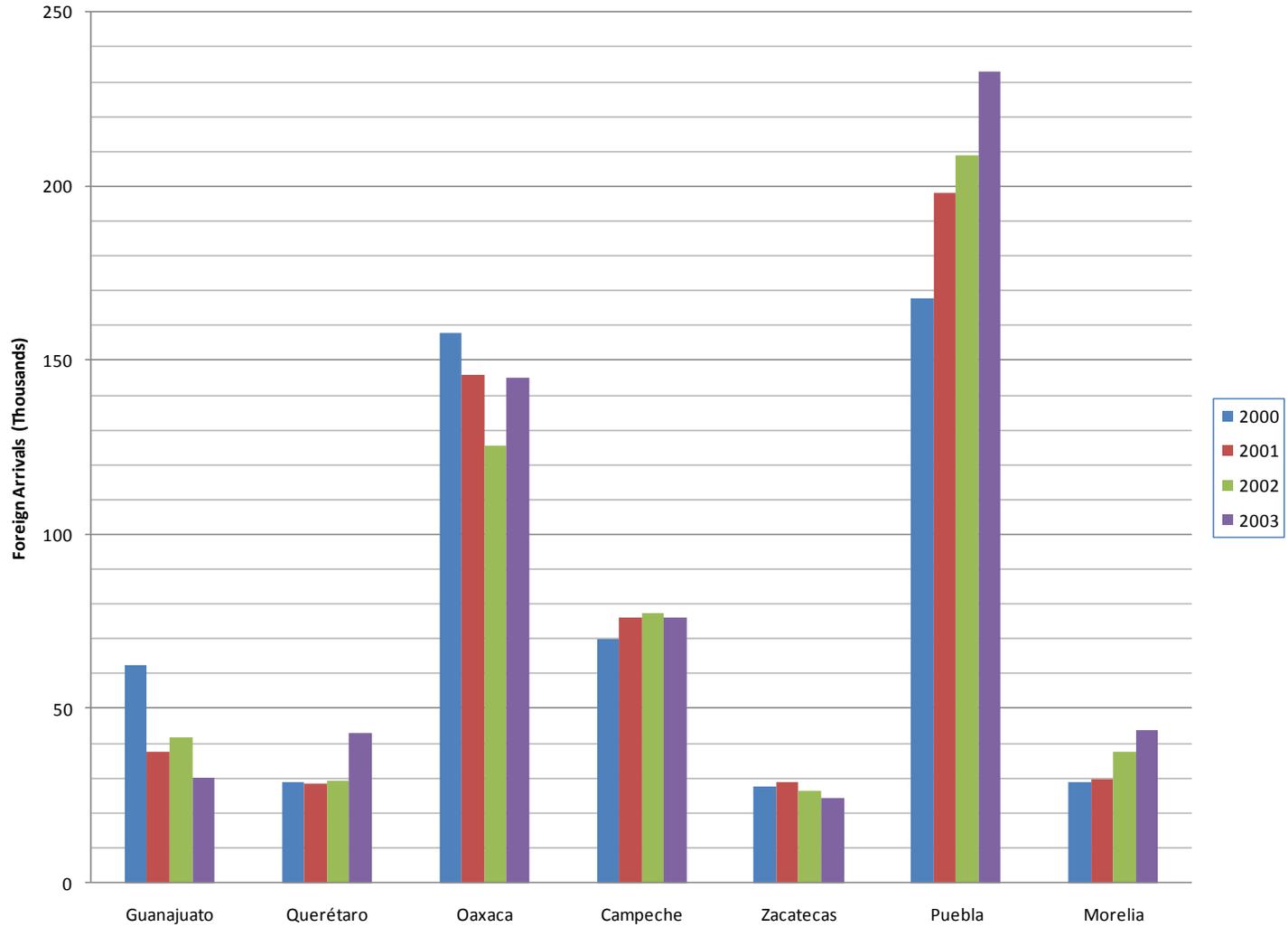


Figure 3-3. Foreign arrivals to Mexican World Heritage cities, 2000-2003. (Source: SECTUR, for dates noted.)

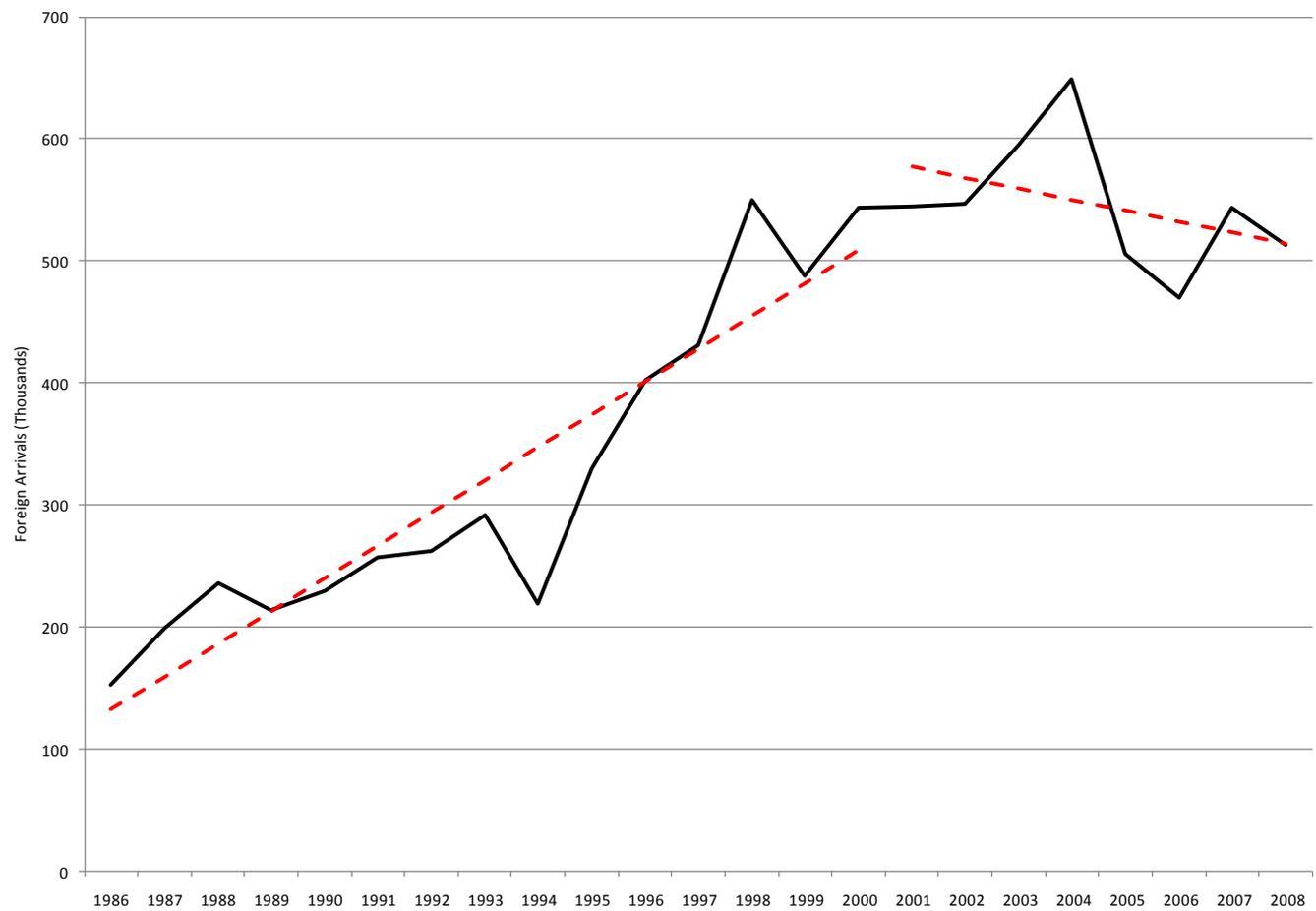


Figure 3-4. Combined foreign arrivals for select Mexican World Heritage cities: 1986-2008. (Source: SECTUR, for dates noted.)

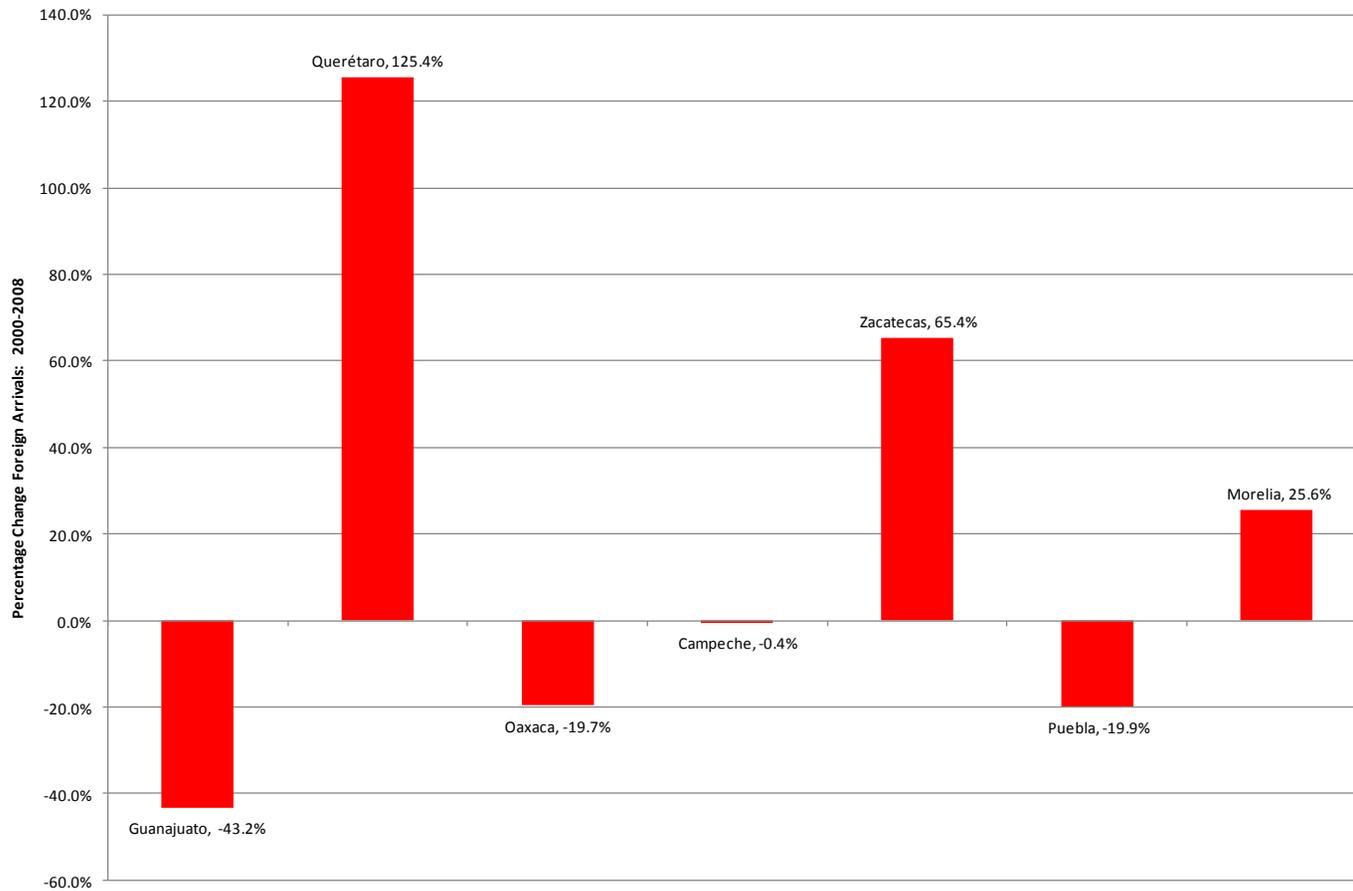


Figure 3-5. Trend in international arrivals for select Mexican World Heritage cities: 2000-2008. (Source: SECTUR, for dates noted.)

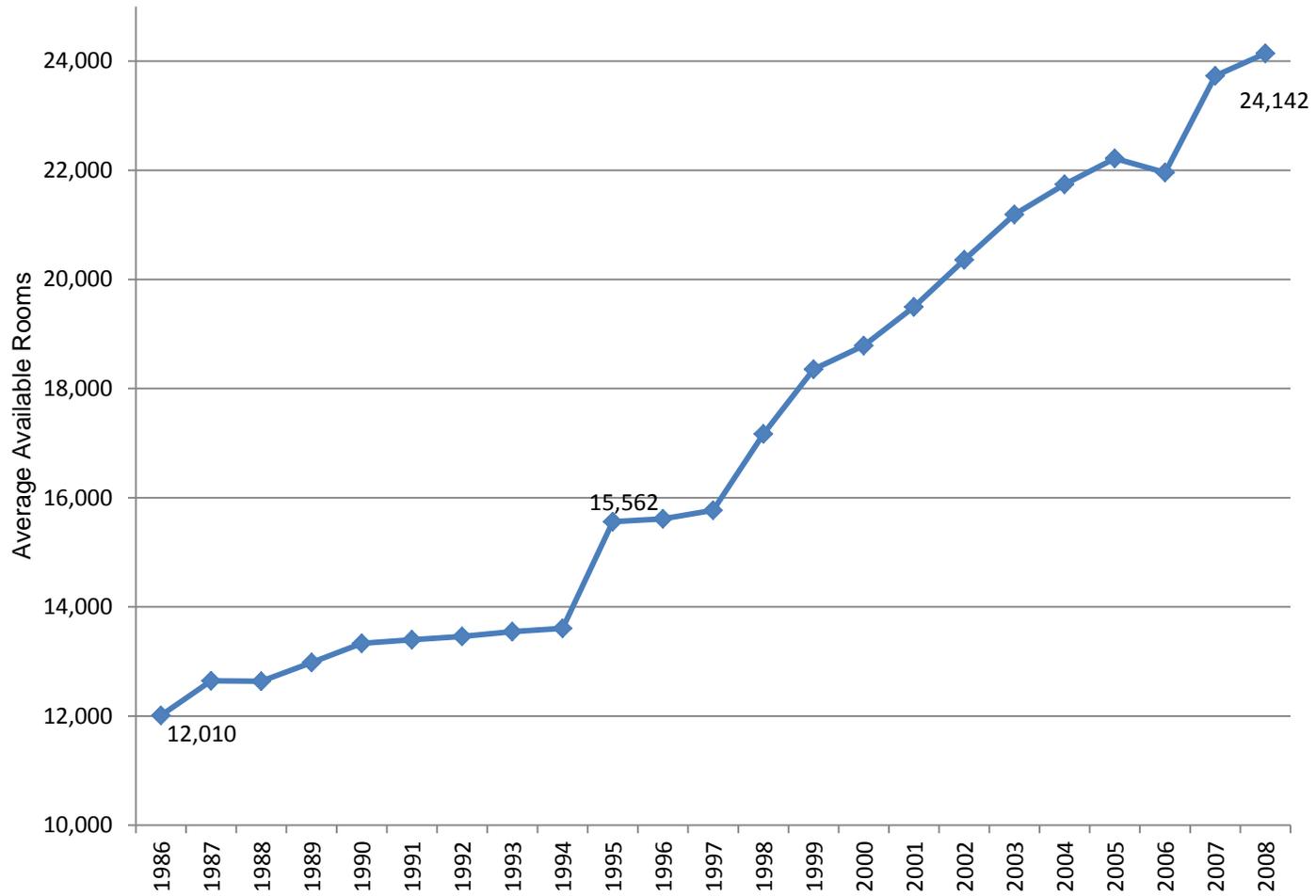


Figure 3-6. Average available rooms for seven Mexican World Heritage cities: 1986-2008. (Source: SECTUR, for dates noted.)

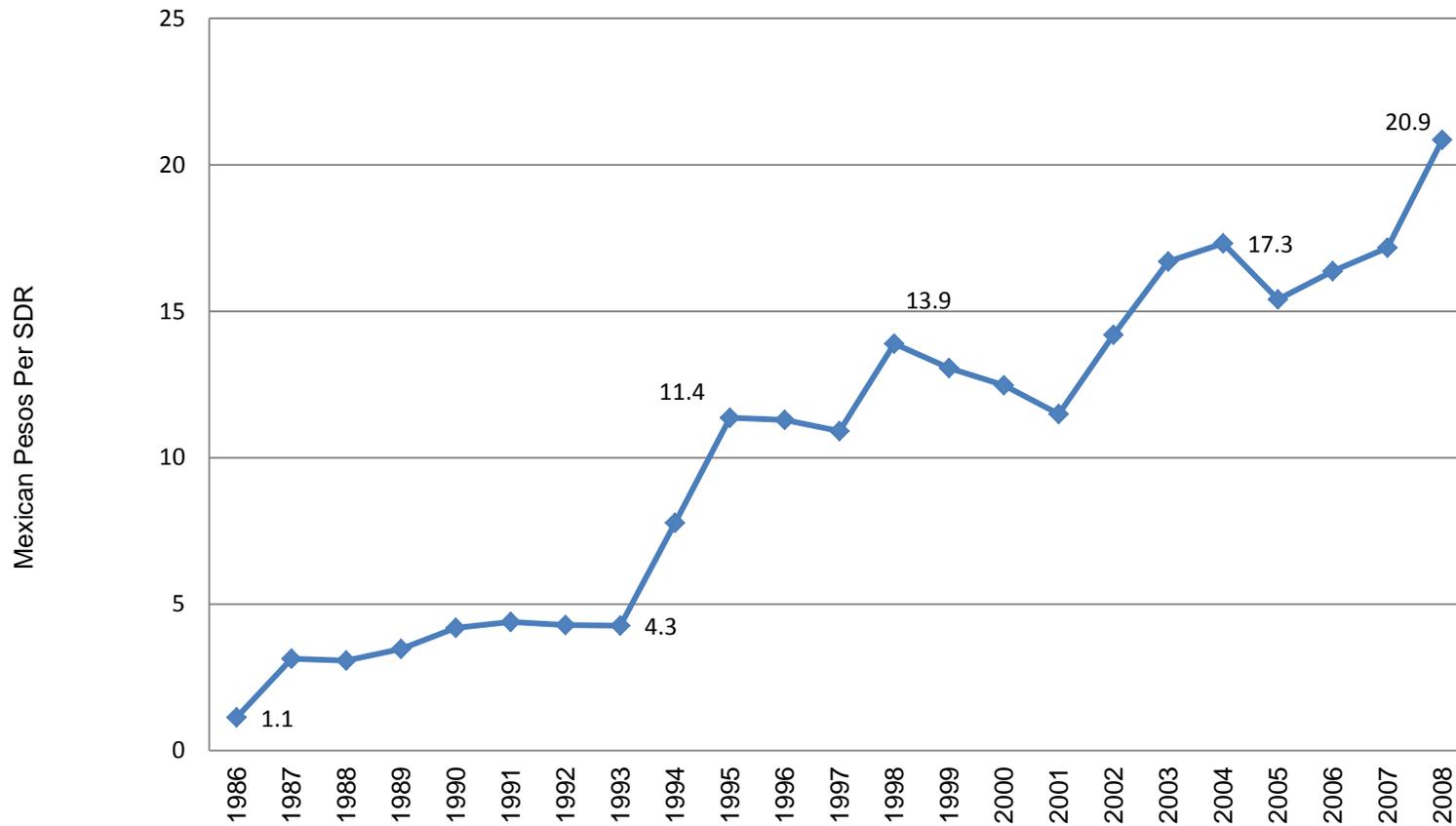


Figure 3-7. Mexican pesos per SDR: 1986-2008. (Source: <http://www.imfstatistics.org.lp.hscl.ufl.edu/imf/>. Last accessed September, 2009.)

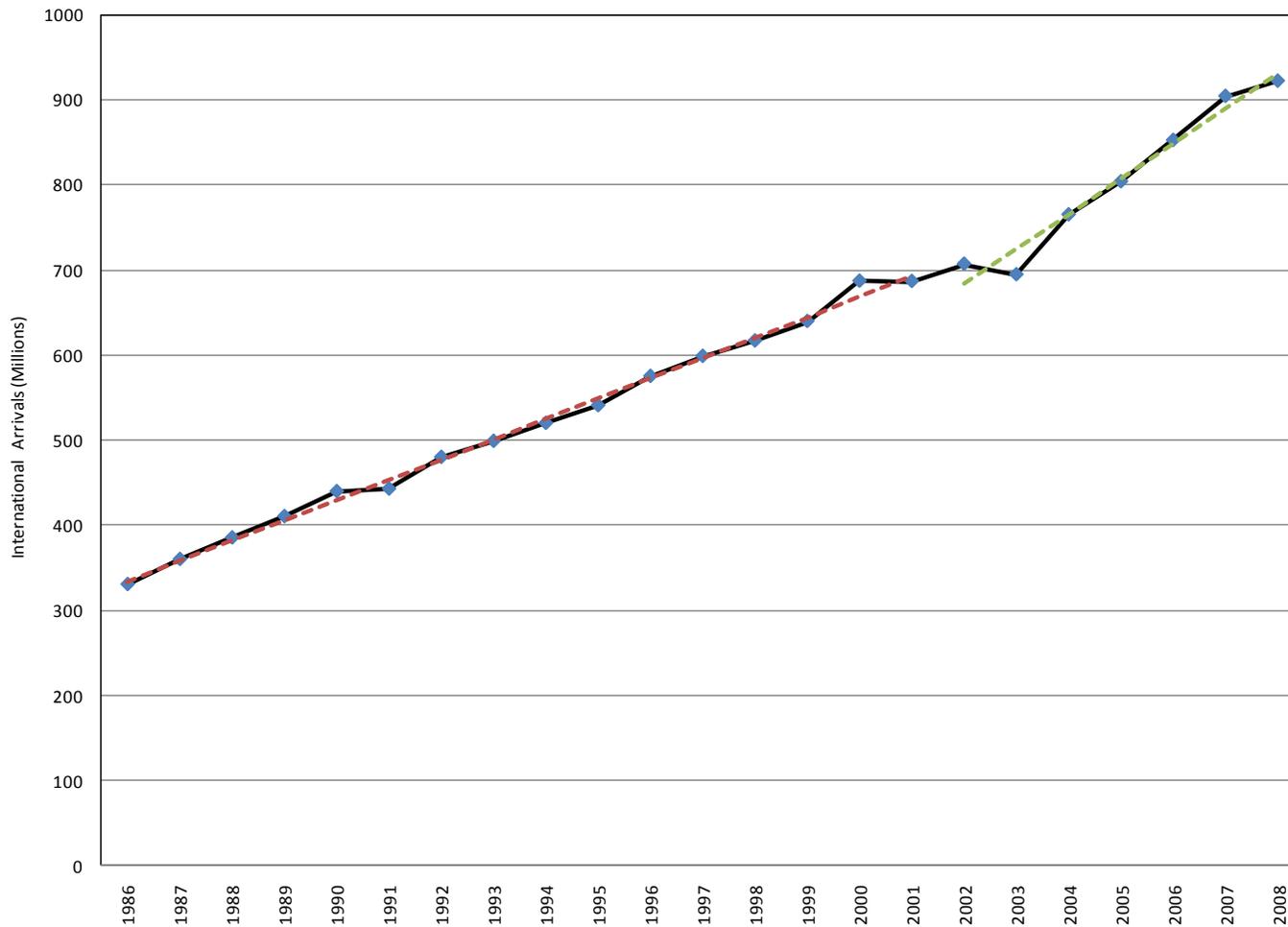


Figure 3-8. International tourist arrivals: 1986-2008. (Source: [http://www.unwto.org/facts/eng/pdf/highlights/UNWTO\\_Highlights09\\_en\\_LR.pdf](http://www.unwto.org/facts/eng/pdf/highlights/UNWTO_Highlights09_en_LR.pdf). Last accessed September, 2009, UN, World Tourism Organization, "Tourism Market Trends," 2006 Edition.)





## CHAPTER 4 STATISTICAL RESULTS AND DISCUSSION

### **Does World Heritage Inscription Stimulate More Visits to World Heritage Cities?**

The above-described procedure produced mixed results. The exploratory process, which entailed multiple model iterations lagging the dummy variable for World Heritage inscription, generated significant and positive coefficients for six of the seven Mexican World Heritage cities under consideration. These results are highlighted below on Table 4-1.

Models were compiled for each of the cities, with multiple iterations for each. The dummy variable for World Heritage inscription was initially assigned a value of 1 beginning with the year of inscription and 0 for prior years. With subsequent iterations the sequence was adjusted to reflect one additional 0 value and one less 1 value for this variable for each data set. The iterative process was repeated with data through 2005. While data are available for 2006 through 2008, assigning a value of 1 to the dummy variables for three years or fewer would provide little basis for valid generalization. From a mechanical standpoint, SAS was unable to specify models for test cases with the World Heritage dummy variable equaling 1 in the extreme out-years. We will consider the seven cities under scrutiny in alphabetical order.

Based on available data and the specified models, for six of the seven cities examined, World Heritage inscription had a significant impact on the number of international visitors. For four of these cities, the lag between inscription and a significant increase in international visitors was five to eight years. Oaxaca, which was inscribed in 1987, required only one year to reflect a statistically significant increase in international visitors. Available data could not generate a model for Campeche that

demonstrated a positive coefficient for the World Heritage dummy variable (implying inscription on the World Heritage list increased the number of international visitors) that was significant at a 95% confidence interval.

The coefficient for the dummy variable for World Heritage designation is a measure of the increase in international visitors attributable to World Heritage inscription. Model results manifest a range of values, many of which appear disturbingly high relative to the total number of international visitors.

As Table 4-1 indicates, when the World Heritage variable for Oaxaca is assigned a value of 1 in 1988, a coefficient of 41.2 is calculated for that variable. This coefficient, significant at a 95% confidence interval, implies that 41,200 internal visitors arrived in that city as a direct result of its inscription. This amount was equal to 33% of total international visitors to that city in 1988. The other extreme emerged in the Querétaro analysis, which implied 193.8% of international visits to that city—at least theoretically—were stimulated by that city's inscription on the World Heritage list in 1996. The peculiar results with respect to magnitude of impact suggest the models, while statistically valid, are poor indicators of the number of visitors resulting from inscription.

Further, implied model results considering all four independent variables plus the constant were typically 19.2% to 82.6% higher than recorded international arrivals.

Summary results for each city and each iteration are shown on Tables 4-2 to 4-8. As noted previously, the model was iteratively calculated in an exploratory analysis using the SAS Proc Mixed routine. For Tables 4-2 to 4-8, the reference year also represents the first of subsequent years in which the assumed value of the World Heritage dummy variable equals 1. Referring to Table 4-2, for example, the results for

year 2001 reflect an assumption that the categorical variable for World Heritage has a value of 0 during years 1999 and 2000, and a value 1 for the remaining years. The remaining data—for Mexican pesos per SDR, average available rooms, and world international tourist arrivals remain the same in all years for any given city.

Prior to analyzing the output, one could expect a variety of outcomes from both a statistical and practical perspective. Data were available for 23 years (1986 to 1988), while World Heritage inscription ranged from 1987—for Oaxaca and Puebla—to 1999 for Campeche. As a consequence, analytical scenarios would exist with as little as one year before or after designation. In such situations it would be difficult to generalize as to the effect of the World Heritage dummy variable. Although this analysis excluded some obvious outliers, there remains an array of possible explanations for the different outcomes for the seven cities under examination.

### **Campeche**

Among the seven cities covered in this analysis, Campeche, would—all things being equal—encounter the most difficulty from a statistical perspective. Campeche was inscribed on December 2, 1999 (UNESCO, World Heritage Center b). Consequently, only nine years of post-inscription experience is available for analysis. With the assumption that an immediate response in terms of international visitors is unlikely and with diminishing post-inscription observations at every iteration of the exploratory analysis, there is scant data from which to generalize.

Model results for the Campeche analysis were unsatisfactory from several perspectives, as highlighted on Table 4-2. Most notably, for all years except one, the coefficient for the World Heritage dummy variable was a negative number. The calculated model assigned a coefficient of +6.9 to the World Heritage dummy variable

when it was assigned a value of 1, beginning in 2000 and remaining so through 2008. Subsequent iterations, where the dummy variable was assigned a value of one beginning in 2001, 2002, etc., all resulted in negative coefficients for that variable. The positive coefficient would at first blush appear to imply that World Heritage inscription stimulated an additional 6,900 international visitors in 2000; however, the p-value for that coefficient (.3400) was not significant at a 95% confidence interval, and it therefore had to be rejected as not significantly different from zero.

Other aspects of the Campeche results, as depicted on Table 4-2, were counterintuitive. While one would theoretically expect to see a measure of consistency for the World Heritage dummy coefficients as the initial year with a value of 1 is advanced, in the case of Campeche, the coefficients generally become increasingly negative as the model was recomputed 2001 through 2004, with the value of the dummy variable changing with each advancing year. The coefficient's p-value became significant at 5% in 2004, but the coefficient value of -64.9 implies that World Heritage inscription was responsible for a decline of 64,900 international visitors during a year when Campeche reported 62,000 foreign arrivals.

In addition to the paucity of post-inscription data points, the Campeche results also could be confounded by a seeming relationship between inscription and global events in the late twentieth century and early twenty-first century which had an important impact on tourism: the late 1990s economic boom and subsequent collapse, coupled with the terrorist attack in New York City on September 11, 2001, and its aftereffects.

Figure 4-1 graphs international tourist arrivals to the seven cities under scrutiny. (For clarity, the scale has been adjusted to conceal outlying data for Oaxaca and

Puebla and reveal more detail regarding trends for the other cities.) International arrivals to Campeche rose nearly 22% in 2000, the first full year after inscription. In 2001, international arrivals increased by another nearly 9.0%. In subsequent years, however, visitor levels declined and leveled off, so that there was essentially no change in foreign arrivals between 2000 and 2008—in both years there were roughly 70,000 foreign visitors. In light of this pattern, the prevailing pattern of negative coefficients for the World Heritage dummy variable appears logical.

One might assume the inability to obtain a significant result with the Campeche data may be due to nothing more profound than minimal available data points. Campeche, significantly, was one of the last cities in this analysis inscribed in the World Heritage list—in 1999—and only eight years of historical data were available post-inscription. Digging a bit deeper, it appears the lack of a statistical relationship between inscription and international visitors may equally attribute to an essentially flat trend in visitors between 2000 and 2008. International visitors to that city declined from 70,079 to 69,793 (-0.4%) between 2000 and 2008. (Reported international visitor levels to Campeche fell another 19.6% in 2009, with the H1N1 influenza crisis and a deep economic recession.) With visitor levels flat between 2000 and 2008, a positive independent effect of inscription would be possible, yet highly unlikely.

Curiously, a fairly recent document (Gravari-Barbas and Jacquot, 2008) offers Campeche as an example of a World Heritage city that experienced a 39.0% increase in visitors in the four years post inscription. The apparent disconnect highlights the danger of looking at only a narrow window. As the institution of World Heritage approaches middle age, more data become available. While the immediate impacts of

inscription are interesting, analysts must increasingly turn their focus toward long-term impacts on visitor numbers, preservation, and authenticity, among other issues.

As noted previously (and highlighted on Figure 3-5) SECTUR data indeed indicate that for the period between 2000 and 2008, international visitors to all seven Mexican World Heritage cities in this analysis were highly variable. In contrast to Campeche, which following its inscription in December 1999 experienced eight years with virtually no net change in international visitors (declining 0.4%), half of the remaining six cities demonstrated large increases, with Zacatecas, Morelia, and Querétaro showing increases of 65.4, 91.2, and 125.4%, respectively, between 2000 and 2008. Simultaneously, international visitor levels decreased 19.7, 24.7, and 43.2%, respectively at Oaxaca, Puebla, and Guanajuato, respectively.

### **Guanajuato**

Guanajuato was inscribed in 1988, providing more post-inscription observations but fewer pre-inscription observations, than with Campeche. As Table 4-3 indicates, a positive coefficient for the World Heritage dummy variable that was also significant was first achieved when a value of 1 was first assigned to that variable in 1995. The p-value for this coefficient was .01, suggesting the coefficient was significant at a 95% confidence interval.

The result suggests World Heritage inscription had a positive effect on international visitors to Guanajuato beginning in 1995—seven years after the city was inscribed on the World Heritage list. The coefficient value of 21.7 implied an increase of 21,700 visitors as a direct impact of inscription, while controlling for variation in the relative value of the Mexican peso, available rooms, and worldwide international tourist

arrivals. The one-time increase amounted to 57.2% of total 1995 international arrivals to Guanajuato and nearly equaled to the number of visitors in 1986.

Based on available evidence, the World Heritage inscription dummy coefficient was also positive and significant at a .05 confidence interval when assigned a value of 1 beginning in 1997—nine years after inscription. The 15.2 coefficient shown on Table 4-3 suggests 15,200 additional annual tourists visited Guanajuato as a result of inscription, controlling for the value of the Mexican peso, available hotel rooms, and global international tourism trends. The 15,200 additional visitors represented 28.6% of all international arrivals to that city in 1997.

The overall fit of the model as measured by the corrected Akaike information criterion (AICc) improved slightly with the second scenario. The value of calculated tourist arrivals for 1986-2008, as implied by the 1995 and 1997 models deviated widely from actual results, with a median difference of -40.2% when the dummy assumes a value of 1 in 1995 and +50.9% for the 1997 version.

One the other hand, the inferior fit of the model based on the dummy variable assuming a value of 1 in 1995 can be demonstrated by the vast range of predicted differences from reported international visitors, from -108.7% to +149.3%, with a standard deviation of 65.5%. With the dummy variable assuming a value of 1 in 1997, the standard deviation of the variation between actual and predicted international visitor arrivals declines from the 65.5% level manifested in the earlier case.

Neither model is a good predictor of tourism levels. Based on all the evidence, one could say—in the case of Guanajuato—that inscription had a significant effect on

international visitor levels that took seven to nine years to develop. One could also say that inscription resulted in a 15,000-22,000 increase in international visitors.

### **Morelia**

Morelia joined the World Heritage list on December 12, 1991. As indicated on Table 4-4, when the World Heritage dummy variable was assigned a value of 1 beginning in years 1991 and 1992—that is, immediately after Morelia’s inscription on the World Heritage list—coefficients for that exogenous variable were negative.

The World Heritage dummy’s coefficient became positive when observations for the World Heritage dummy variable were assigned a value of 1 beginning in 1993, although a p-value within a .05 confidence interval was not achieved until 1999. When the variable is assigned a value of 1 beginning in 1999 and continuing with subsequent iterations through 2005, the coefficient remained positive and significant at .05 ( $p=.0305$ ).

As indicated on Table 4-4, the best fit was achieved when the World Heritage dummy was assumed to achieve a value of 1 beginning in 2002. The AICc for that model was 109.7 versus 120.7, which was recorded with the model based on the dummy variable equaling 1 beginning in 1999. Calculated annual international visitors to Morelia for 1999 using the 1999 model were on average 29.8% higher than the total reported by SECTUR. The 2002 model generated calculated results that averaged 17.1% higher than total reported visitors for that year. Taking guidance from the previous discussion for Guanajuato, one might conclude that, based on available data, World Heritage inscription added between 8,800 to 13,300 annual international arrivals to Morelia, and this impact took eight to thirteen years to occur.

## Oaxaca

The Historic Center of Oaxaca and Archaeological Site of Monte Albán was inscribed on the World Heritage in December 1987 (International Monetary Fund 2009; International Council of Monuments and Sites 1986). Oaxaca received 126,713 foreign visitors in 2008—a level of volume that was second to Puebla among the seven cities under examination here. More punishing decreases in international visitors to Puebla in 2009, gave Oaxaca most-visited status in that year. Oaxaca’s reputation for art, handicrafts, and food, along with its location a few kilometers from “one of the most impressive ancient sites in Mexico” (Noble 2008), is largely responsible for the city recording nearly one foreign visitor for every two municipal residents—higher than any of the other Mexican World Heritage cities under scrutiny.

As indicated on Table 4-5, analysis of the 1986-2008 data implied a nearly immediate impact of World Heritage inscription on foreign visitors for this city. Based on all data, World Heritage inscription was responsible for 41,200 annual foreign visitors to The Historic Center of Oaxaca and Archaeological Site of Monte Albán, beginning in 1988.

This ambitious result perhaps could attribute to Oaxaca’s reputation; however, one cannot reject the possibility that spurious data may have resulted in this outcome. Data supplied by the Mexican Tourist Board indicate a 42.2% increase in foreign visitors there between 1986 and 1987—from 74,716 to 106,256. The one-year 34.4% drop in foreign visitors reported from 1993 to 1994 may be due to a combination of events. The trend in international arrivals (as highlighted on Figure 3-2) suggests the 1994 Mexican financial crisis had wide scale impact on foreign tourist arrivals. In the case of Oaxaca, the decline may have been exacerbated by the Zapatista revolt in neighboring Chiapas,

which began in 1994. This drop more than evaporated with a 66.0% increase in visitors one year later.

When observations for 1986 and 1994 are dropped from the data set, SAS generates models showing the World Heritage inscription dummy variable becoming significant when assigned a value of 1 in 1991. The AICc for this model is 171.9, which suggests an improved fit over any of the models obtained when 1986 and 1994 data are included. The model suggests inscription generated a one-time increase of 38,400 international visitors to Oaxaca and Monte Albán, while controlling for the relative value of the Mexican peso, available rooms, and global tourist arrivals.

Without this data manipulation, it appears World Heritage inscription provided an increase of 41,200 annual visitors beginning in 1988. This represents approximately one-third of total international arrivals at Oaxaca in 1988.

### **Puebla**

Like Oaxaca, Puebla was one of the more obvious choices for early World Heritage inscription, joining the list in 1987. As with Oaxaca, there are plentiful data, but they lack some of the extreme swings in the early years seen in the previous example of Oaxaca.

The massive scale of foreign visitors to Puebla—1998 data indicate it had 100,000 international visitors more than Oaxaca, the second-largest Mexican World Heritage city, and 157,000 more than the next-most-visited Mexican World Heritage city, Campeche—highlight some bizarre trends, such as Puebla's 61.5% decline in international visitors between 2004 and 2005. (Figure 3-2.) Because this disturbance occurs in the out-years of the analysis, it has minor impact on the validity of model results. As indicated on Table 4-6, it took seven years for World Heritage inscription to

have a significant impact on international arrivals to Puebla, accounting for an increase of nearly 88,700 annual visitors. With 65,513 total international arrivals at Puebla in 1995, the calculated increase from World Heritage inscription accounts for about 135.4% of all foreign visitors to Puebla then—a level far in excess of the range of 33-68% indicated at the six other cities under consideration. Among the nineteen iterations of the model run in this part of the exploratory analysis, the model assuming a value of 1 for the World Heritage dummy variable in 1995 also produced the best fit, revealing the lowest AICc of the nineteen runs.

As previously noted, aspects of Puebla are unique among the seven World Heritage cities examined here. It is a major industrial city with a population of 1.4 million. It is home to Volkswagen's sole North American assembly plant, which directly employs 14,900 workers (Volkswagen, AG) and by itself would generate considerable international visits from corporation officials and suppliers. Further, Puebla is within close proximity to Mexico City, generating far more visits by day-trippers.

### **Querétaro**

Among the seven Mexican World Heritage cities, none has witnessed a higher rate of increase for foreign tourist arrivals than Querétaro during the years 2000 to 2008. Foreign arrivals to that city increased by 36,011, or 125.4% within that interval. Between 1986 and 2008, visitors to Querétaro increased more than five-fold, from 10,417 to 64,723. The large increases have been attributed to heavy public investment there and in Zacatecas: "If you look at Querétaro and Zacatecas, you have two cities where the state government has been investing a lot in culture. It is two cities where the security

situation is normal.”<sup>1</sup> Querétaro benefits from a location only 222 kilometers (138 miles) from Mexico City, which positions it as the second-closest World Heritage city to the Mexican capital.

As highlighted in Figure 4-1, Querétaro, which entered the World Heritage list in 1997 achieved a 261.0% increase in international arrivals between 1997 and 1998. The surge in visitors resulted in a model that demonstrates a significant (at 2%) increase in international visitors beginning in 2002. As we have seen previously, the implied increase related to World Heritage Inscription here was radically higher than visitor levels, suggesting the model is less than reliable for measuring visitor increases. In this instance, the coefficient implies an 18,800 increase in international arrivals in 2002 as an independent and direct result of inscription. SECTUR reported only 9,748 international arrivals to Querétaro in 1997.

### **Zacatecas**

As with Guanajuato, Zacatecas developed because of silver production. Its location 560 kilometers north of Mexico City places it on the outer fringe of the collection of World Heritage cities to the north and west of the capital, which also includes Morelia, Guanajuato, Querétaro, and San Miguel de Allende.

Zacatecas was inscribed on the World Heritage list in 1993. In 1986, the city was of little interest to foreign visitors, attracting only 4,543 arrivals, according to SECTUR—only 43.3% of the level achieved by the next most attractive among the seven World Heritage cities examined here (Querétaro). None of the seven cities witnessed as

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<sup>1</sup> Count Philippe de Reiset (owner, Hotel Villa Montana, Morelia), in discussion with the author, August 2010.

dramatic increases as Zacatecas did between 1986 and 2008, when foreign visitors increase nearly nine-fold.

Following inscription, international visitors to Zacatecas grew modestly, and then took off toward the end of the twentieth century. Interviews with tourism officials in other states suggest the proactive posture of Zacatecas state's governor with President Felipe Calderón's administration and the city's lack of narco-violence have helped the city to become a more attractive destination.

Model results suggest it took seven years for World Heritage list membership to have a statistically significant and positive impact on foreign tourist arrivals to Zacatecas. The model again appears to exaggerate the impact of World Heritage, suggesting 8,900 people were attracted to the city solely because of its inscription, in 1998. (Table 4-8.) This represented 68.4% of total foreign arrivals to the city. All four coefficients plus the constant generated a forecast of total foreign arrivals that was 235.1% higher than historical 1998 results, as reported by SECTUR. Forecast results trended closer to reported figures in the out years. For example, model results were 97.3% of reported figures for 2008.

Table 4-1. Summary model results for selected Mexican World Heritage cities

City	Year inscribed	Year when World Heritage variable becomes significant*	Coefficient: dummy variable, World Heritage inscription	Coefficient: pesos per SDR	Coefficient: avg. available rooms	Coefficient: world tourist arrivals
Campeche	1999	n/a	n/a	n/a	n/a	n/a
Guanajuato	1988	1995	21.7	-0.4	-5.8	-0.1
Morelia	1991	1999	8.8	0.4	14.2	0.5
Oaxaca	1987	1988	41.2	10.7	3.7	-33.1
Puebla	1987	1995	88.7	-5.6	9.1	25.6
Querétaro	1996	2002	18.8	0.2	30.2	-2.8
Zacatecas	1993	1998	8.9	-0.7	3.3	4.6

\* First year when the World Heritage dummy coefficient is significant at a 95% confidence interval and has a positive sign, implying that it has a significant and positive effect on international visitor levels.

Table 4-2. Summary model results for Campeche

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1999	-59.2	.0150	-21.4	.0231	-2.0	.0449	-106.3	.0176	34.9	<.0001	149.5
2000	51.9	.0110	6.9	.3400	3.0	.0100	-84.6	.0017	7.5	.1088	152.9
2001	-5.6	.8407	-6.0	.5403	0.3	.7708	-80.8	.0498	19.8	.0025	152.4
2002	-31.4	.3675	-14.5	.2820	-0.0*	.2957	-51.9	.2957	19.6	.0013	150.4
2003	-61.5	.0998	-27.3	.0766	-0.1	.9108	-14.5	.7792	17.9	.0027	146.8
2004	-64.9	.0079	-33.3	.0003	0.1	.8953	-15.4	.5354	17.2	.0001	139.8
2005	-26.6	.2339	-21.4	.0052	0.8	.4486	-54.9	.0163	16.6	.0004	142.1

\* -0.005

Table 4-3. Summary model results for Guanajuato

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1988	-0.2	.0658	-143.9	.0017	0.6	.8898	99.7	.0129	-14.1	.3440	196.2
1989	45.9	.1006	1.7	.7624	1.9	.1124	-9.7	.6348	-2.0	.6659	152.4
1990	46.4	.1015	2.0	.7083	2.0	.0899	-9.2	.6319	-2.36	.5578	148.7
1991	49.3	.0864	0.3	.9449	2.1	.0762	-13.7	.4273	-1.6	.6127	145.8
1992	47.8	.1161	-2.9	.6501	1.8	.1798	-18.2	.3549	0.4	.9268	147.8
1993	46.6	.1175	6.1	.4295	1.8	.2066	-2.8	.8875	-4.0	.3413	148.9
1994	48.1	.1109	8.0	.4247	1.3	.4565	-5.5	.7286	-2.2	.5577	146.9
1995	59.7	.0289	21.7	.0124	-0.4	.7286	-5.8	.7148	-0.1	.9688	143.1
1996	67.6	.0409	12.3	.0887	1.6	.0734	-11.2	.5416	-3.8	.2830	145.7
1997	81.9	.0194	15.2	.0320	1.8	.7663	-17.2	.3527	-4.2	.2230	142.7
1998	71.2	.0908	9.1	.2769	2.0	.0527	-17.7	.4365	-3.0	.4688	147.8
1999	19.6	.6714	-2.9	.7475	2.4	.0190	8.3	.7335	-4.7	.2743	149.3
2000	-69.5	.1568	-20.6	.0445	1.9	.0656	48.2	.0677	-3.5	.3940	148.9
2001	-5.6	.8407	-29.2	.5403	0.3	.7708	-80.8	.0498	19.8	.0625	152.4
2002	-7.7	.7608	-20.4	.0030	1.9	.0598	1.9	.9008	0.8	.8290	147.0
2003	6.9	.6378	-21.4	.0002	1.4	.0377	-13.7	.1635	3.9	.1191	138.1
2004	6.8	.6877	-18.6	.0044	0.7	.3835	-13.9	.1779	5.4	.1241	146.5
2005	21.5	.3639	-11.0	.1406	0.9	.3893	-10.6	.2792	2.4	.6003	150.6

Table 4-4. Summary model results for Morelia

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1991	-41.9	.1135	-3.8	.3182	0.2	.7632	15.1	.1801	3.9	.1403	133.3
1992	-49.7	.0894	-1.9	.6459	0.1	.8744	19.4	.1201	3.3	.2249	133.6
1993	-52.6	.0665	0.9	.8505	0.1	.8851	23.4	.0466	1.9	.4370	133.2
1994	-51.2	.0723	0.3	.9573	0.1	.9334	22.1	.0563	2.4	.3246	131.5
1995	-45.9	.0809	2.0	.7067	0.1	.9885	20.9	.0359	2.3	.2936	130.2
1996	-40.1	.1160	2.2	.5650	0.2	.6958	19.4	.0383	1.8	.3302	129.2
1997	-29.5	.2155	4.7	.2104	0.3	.5720	17.2	.0445	1.2	.4742	126.9
1998	-21.0	.3487	6.7	.0793	0.4	.4060	15.4	.0524	0.7	.6612	123.8
1999	-15.0	.5036	8.8	.0305	0.4	.3919	14.2	.0669	0.5	.7336	120.7
2000	1.0	.9622	12.4	.0031	0.6	.2036	10.4	.1571	-0.1	.9257	117.3
2001	-6.7	.6937	12.5	.0011	0.4	.2838	12.8	.0544	0.3	.7953	113.7
2002	-13.5	.3356	13.3	.0003	0.2	.4690	15.4	.0130	0.7	.5715	109.7
2003	-31.3	.0624	12.8	.0009	0.1	.8607	22.2	.0040	0.6	.6761	113.3
2004	-36.2	.1374	11.8	.0155	0.6	.2830	25.7	.0190	-1.2	.6038	123.6
2005	-49.5	.1442	6.4	.3061	0.6	.4576	26.9	.0698	-0.2	.9524	133.0

Table 4-5. Summary model results for Oaxaca

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1987	199.1	.0004	46.5	.0567	9.9	.0275	2.6	.9043	-28.8	.0559	198.3
1988	214.4	.0002	41.2	.0330	10.7	.0163	3.7	.8664	-33.1	.0330	197.3
1989	210.2	.0004	29.2	.1790	10.2	.0276	2.1	.9265	-30.4	.0550	198.9
1990	215.4	.0004	30.3	.1344	10.0	.0322	-0.6	.9758	-29.1	.0627	197.8
1991	213.7	.0005	29.2	.1544	9.5	.0461	-2.4	.9155	-26.8	.1186	196.8
1992	207.1	.0010	25.0	.2610	9.1	.0682	-3.1	.8951	-24.5	.3516	196.5
1993	179.2	.0045	11.4	.6650	8.4	.1370	-11.2	.6586	-14.3	.7795	197.3
1994	146.3	.0157	-5.8	.8646	8.5	.1913	-21.3	.4092	-3.9	.4631	196.2
1995	251.5	.0001	79.4	.0162	1.2	.8130	-9.5	.6423	-10.3	.0394	193.3
1996	332.8	<.0001	88.7	.0007	6.6	.0095	-23.9	.1595	-23.2	.0262	189.4
1997	373.3	<.0001	88.0	.0013	9.6	.0095	-35.6	.0564	-27.4	.0151	192.6
1998	347.8	.0003	65.6	.0552	10.9	.0095	-33.1	.1915	-28.3	.0262	198.3
1999	-230.4	.0658	-143.9	.0017	0.6	.8898	99.7	.0129	-14.1	.3440	196.2
2000	-85.4	.4296	-95.6	.0103	3.3	.4827	57.6	.0629	-13.4	.3459	193.9
2001	-41.0	.6245	-83.3	.0057	4.3	.2668	49.8	.0419	-17.3	.1391	191.7
2002	6.0	.9249	-75.1	.0024	7.2	.0360	34.8	.0590	-20.5	.0384	190.3
2003	71.6	.2801	-50.5	.0330	8.3	.0341	18.0	.3394	-20.7	.0761	195.7
2004	117.3	.1260	-30.7	.2239	8.5	.0511	7.8	.6927	-20.3	.2080	198.4
2005	76.8	.3607	-52.2	.1115	7.8	.0941	-17.0	.4525	-0.4	.9830	194.6

Table 4-6. Summary model results for Puebla

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1987	-49.7	.5333	17.3	.7563	7.9	.2510	70.5	.1750	-30.9	.1998	211.1
1988	-90.1	.2038	55.1	.0684	2.3	.6588	116.5	.0217	-41.3	.1168	208.7
1989	-69.7	.3406	43.8	.1164	3.6	.5275	92.2	.0402	-32.4	.1560	206.3
1990	-86.8	.2250	38.2	.0819	1.0	.8443	73.4	.0168	-13.6	.3577	203.3
1991	-90.6	.2172	36.0	.0999	-1.2	.7740	50.7	.0280	4.4	.6644	201.1
1992	-51.1	.5079	27.9	.2469	3.1	.5648	34.2	.1491	0.3	.9838	200.1
1993	-71.7	.3933	39.5	.1754	-2.0	.6581	27.7	.2586	17.0	.0692	197.2
1994	-53.4	.5339	57.4	.0817	-4.2	.2377	21.3	.3867	23.0	.0010	192.7
1995	3.2	.9727	88.7	.0309	-5.6	.0022	9.1	.6954	25.6	<.0001	187.3
1996	-164.6	.0071	18.3	.4203	-4.0	.0356	53.2	.0004	20.1	.0005	188.9
1997	-216.1	.0029	-1.2	.9634	-4.3	.0717	64.2	.0003	21.2	.0025	190.2
1998	-207.9	.0031	2.2	.9320	-4.3	.0706	63.3	.0003	20.5	.0021	186.0
1999	-44.0	.7116	29.6	.4236	4.1	.3447	26.6	.3711	3.4	.7646	193.3
2000	-147.0	.0711	2.3	.9398	0.7	.8158	49.1	.0135	10.3	.3065	191.2
2001	-272.9	.0004	-34.8	.2951	-3.6	.1968	70.8	.0004	21.8	.0291	192.1
2002	-371.1	<.0001	-69.7	.0407	-6.8	.0241	87.2	.0002	29.6	.0088	195.0
2003	-428.9	<.0001	-98.7	.0150	-7.9	.0117	96.0	<.0001	31.8	.0068	191.7
2004	-476.7	<.0001	-139.3	.0010	-6.7	.0561	109.0	<.0001	24.0	.0567	190.4
2005	-536.2	<.0001	-177.2	<.0001	-9.1	.0082	100.6	<.0001	36.6	.0028	177.5

Table 4-7. Summary model results for Querétaro

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1996	-48.6	.0405	7.3	.3645	-1.1	.0387	32.5	.0004	1.9	.2978	143.4
1997	-15.5	.5216	18.8	.0432	-0.8	.1176	22.6	.0095	0.9	.5492	139.8
1998	25.2	.2539	33.1	.0014	-0.2	.6499	10.6	.1407	-0.5	.7105	133.9
1999	-83.4	.0071	-3.4	.7221	-1.5	.0959	47.8	<.0001	0.9	.7526	144.9
2000	-90.4	.0015	-5.9	.5223	-1.6	.0578	49.8	<.0001	1.2	.6699	142.0
2001	-41.4	.0486	9.8	.2576	-0.4	.6471	36.5	<.0001	-1.8	.5589	144.6
2002	-18.2	.2609	18.8	.0293	0.2	.7953	30.2	.0002	-2.8	.3676	140.1
2003	-8.4	.5724	24.8	.0041	0.2	.6773	27.9	.0003	-2.7	.3787	139.0
2004	-2.3	.8748	28.6	.0011	0.6	.3680	29.5	<.0001	-4.0	.1319	135.2
2005	-23.2	.4254	18.1	.1439	0.7	.6183	31.1	.0112	-2.9	.6024	155.1

Table 4-8. Summary model results for Zacatecas

Year	Constant		World Heritage		Pesos per SDR		Avg. avail. rooms		World tourist Arrivals		AICc
	Value	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	Coeff.	P-Value	
1993	-35.0	.0016	-6.9	.0330	-0.5	.3179	-0.7	.9228	9.4	.0192	119.0
1994	-18.9	.0380	-7.4	.1126	0.6	.4219	7.6	.3001	2.8	.4274	120.1
1995	-21.1	.0403	-3.0	.4966	-0.4	.5501	8.5	.3096	5.0	.2413	122.2
1996	-10.7	.2566	3.5	.2904	-0.9	.0579	8.5	.3000	4.4	.2461	122.5
1997	-6.4	.4129	5.8	.0921	-0.8	.0525	5.7	.4468	4.5	.1837	120.1
1998	-1.9	.7831	8.9	.0166	-0.7	.0420	3.3	.6407	4.6	.1382	116.5
1999	<0.1*	.9941	10.9	.0056	-0.7	.0360	0.7	.9231	5.1	.0837	112.1
2000	1.7	.7781	13.2	.0001	-0.7	.0256	-1.6	.7516	5.8	.0190	106.1
2001	-13.9	.1479	7.0	.0506	-1.1	.0194	2.2	.7898	7.6	.0598	118.0
2002	-15.2	.1359	4.3	.2138	-1.3	.0155	8.6	.2860	6.0	.1491	119.4
2003	-12.5	.2309	2.9	.2872	-1.2	.0210	12.3	.0962	4.4	.2625	118.2
2004	-7.4	.4778	4.0	.3661	-0.9	.0309	16.2	.0143	2.1	.5122	116.9
2005	-10.0	.3969	2.2	.6785	-0.9	.0542	16.7	.0180	2.2	.5420	117.4

\* 0.048

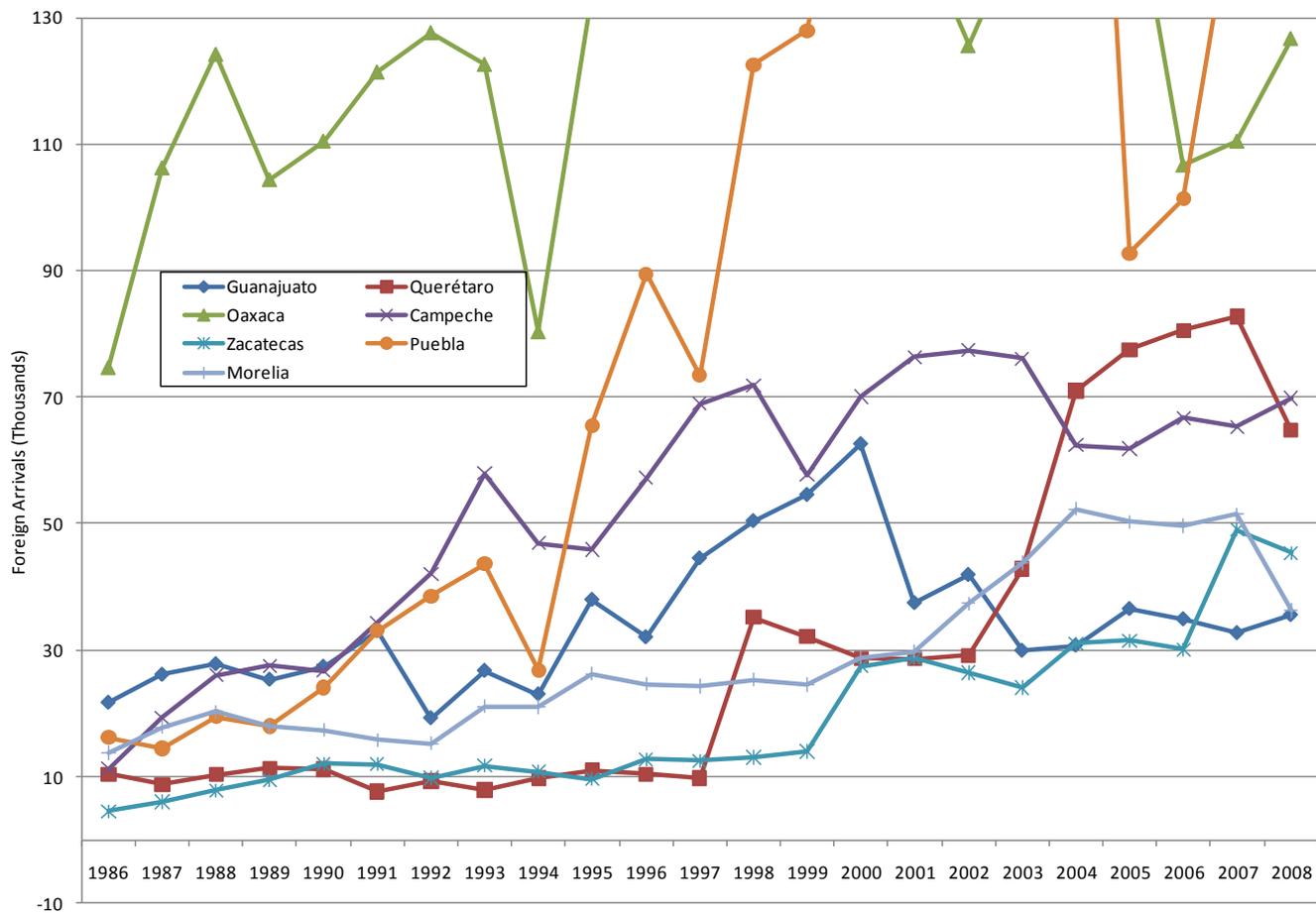


Figure 4-1. Annual foreign arrivals for selected Mexican World Heritage cities: 1986-2008, with scale adjusted for clarity. (Source: SECTUR, for dates noted.)

## CHAPTER 5 MANAGEMENT AND PLANNING ASPECTS OF HERITAGE TOURISM

### **Overview**

Viewed in aggregate, the combined international visitors to seven Mexican World Heritage cities between 1986 and 2008 can be broken into two distinct trends: 1) a steady progression upward from 1986 to 2000, with a strongly positive (+91.5) correlation coefficient between annual international visitors and the advance of time, and 2) a weaker downward trend between 2001 and 2008, with a -51.8 correlation coefficient between international visitors and time.

It should be noted that the aggregate negative trend between 2001 and 2008 attributes mightily to a net decline of more than 100,000 international arrivals to Oaxaca and Puebla during the period, which vastly overshadows the net increase of 52,931 international visitors to Campeche, Guanajuato Morelia, Querétaro, and Zacatecas.

This raises an important question that invites a discussion of public policy, planning, and management behaviors within the various cities.

During the late 1980s and beyond, all Mexican World Heritage Cities operated in a similar environment with respect to the relative value of the Mexican peso, perceived insecurity about flying, safety from drug-related violence, and global economic trends. What was it that caused international visitors to decline in some cities after significant increases in foreign visitors attributable to World Heritage inscription, and increase in others?

To answer this, the analysis focused on two World Heritage cities with two decidedly different outcomes with respect to foreign visitors following 2000: The Historic Town of Guanajuato and Adjacent Mines and The Historic Center of Morelia. These two

cities do not represent polar extremes. Nor do they demonstrate any great similarity. As noted previously, while both Guanajuato and Morelia are state capitals, the former is a small city with an economy built on tourism and education, while the latter is several times larger, with a far more diverse economy.

As the modeling exercise indicated, Guanajuato demonstrated a statistically significant post-inscription increase in international visitors, effective in 1995. The city, however, exhibited a precipitous fall in international visitors after 2000. Figure 5-1 highlights the trend in international arrivals to Guanajuato between 1986 and 2009.

From inscription in 1988 to 2000, international visitors to Guanajuato increased at a 7.0% annual average rate, although, as Figure 5-1 indicates, there was substantial year-to-year variability. Going forward from 2000, however, the trend in international visitors to that city demonstrated a -6.8% annual decline between 2000 and 2008.

In contrast, Morelia, which was placed on the World Heritage list in 1991, saw the number of international visitors generally increase 55.2% between its inscription and 1999. This is equivalent to an annual growth rate of 5.6%. During the five years from 1999 to 2004—a period during which international visits to Guanajuato dropped 50.9%, Morelia saw international visitors increase 81.2%—an average annual increase of 16.4%.

Between 2004 and 2007, the trend for international arrivals to Morelia effectively flattened out. As Figure 5-2 highlights, the number of visitors to that city in 2008 tumbled 29.6% from the 51,478 visitors recorded in 2007. The obvious explanation for this change was a series of explosions detonated in two sites in the city's historic center during Independence Day celebrations on the night of September 15, 2008. (Figure 5-

3.) The grenades killed seven people and injured more than 100 others (Lacey 2008). Indeed, if one were to assume no foreign visitors arrived after the violence and apply the remaining proportion to total 2007 international arrivals in Morelia, the subsequent result nearly matches reported visitors in 2008. That is, September 15 was the 259th day of the year in 2008. Applying 259/366—or 70.8%—to the 51,478 visitors reported in 2007, the result becomes 36,428 visitors. This result is 0.5% different from the 36,236 reported by SECTUR in 2008.<sup>1</sup>

The pile-up of unfortunate events in 2009 led to across-the-board double-digit decreases in international arrivals to the seven World Heritage cities considered here, ranging from a 19.6% drop in Campeche to a 47.1% fall in Zacatecas. Between 2008 and 2009, international arrivals fell 46.6% in Guanajuato and 28.9% in Morelia. The smaller decline in Morelia reflects a base year in 2008 that already suffered losses from the September 15 violence. Had 2008 Morelia arrivals remained consistent with 2007 levels, the 2008-2009 decline in that city would have been 50.0%.

The statistics indicate a significant role for World Heritage inscription in driving foreign visitor levels between during the ten or so years after these cities were listed. What happened after that period that caused such remarkably different trends for these cities, specifically, and all seven cities, in general?

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<sup>1</sup> Violence continues to affect Morelia's tourism industry. A September, 10, 2010, warning from the US State Department suggests US citizens avoid Michoacán: "The state of Michoacán is home to another of México's most dangerous DTOs, "La Familia". In June 2010, Fourteen federal police were killed in an ambush near Zitacuaro in the southeastern corner of the state. In April 2010, the Secretary for Public Security for Michoacán was shot in a DTO ambush. Security incidents have also occurred in and around the State's world famous butterfly sanctuaries. In 2008, a grenade attack on a public gathering in Morelia, the state capital, killed eight people. U.S. citizens should defer unnecessary travel to the area. If travel in Michoacán is unavoidable, U.S. citizens should exercise extreme caution, especially outside major tourist areas" (US Department of State 2010).

A number of sources were consulted to divine what may have led to these different outcomes. Newspaper accounts, journal articles, data, and reports were gathered from electronic sources and on site. In both Guanajuato and Morelia, semi-structured interviews were conducted with an array of current and former public officials, academics, and preservationists in the city. Interviewees were selected based on reputational and snowball sampling. The interviews developed from an initial short series of open-ended questions. Their duration ranged from thirty-five minutes to four hours.

### **Guanajuato**

Results revealed a basket of explanations, many of which surfaced repeatedly. In the case of Guanajuato, the five issues surfaced as important drivers behind the statistics. The principal topics will be discussed in turn. Some identified issues are not uniquely relevant to addressing the issue at hand—understanding why Guanajuato tourism increased during the 1990s and early 2000s, only to fall precipitously. For example, the poor quality of Guanajuato hotels and restaurants was mentioned frequently as a challenge to tourism growth, yet it is highly unlikely that the city's hotels and restaurants improved dramatically during prior to 2001, only to decline rapidly in subsequent years. Further, topics frequently overlap, and at times it is difficult to discuss any in isolation of others. For example, in the Mexican milieu it is especially difficult to

talk about tourism planning and strategy without including politics, given the large role that tourism has in Mexico's economy. The issues that surfaced are as follows:

- planning and strategy;
- branding and slogans;
- political impacts;
- *Festival Internacional Cervantino*; and
- data questions.

### **Planning and Strategy**

Inconsistent tourism planning and strategies challenge visitor-level growth to Guanajuato. The city's heritage comprises much of its allure for visitors, although culture becomes an important attraction during festivals. Guanajuato's climate is typically pleasant—warm and dry—but it is located in central Mexico, far from any beach resorts. Built in a narrow ravine, there is little room for parks, and aggressive logging denuded vast areas of nearby mountain forests, rendering them unattractive for hiking and camping. No well-known archaeological sites surround the city, although two sites, Peralta and Plazuelas, have recently been developed by INAH and are open to the public. In relation to the city of Guanajuato, the two sites are perhaps thirty minutes beyond Irapuato, which is approximately forty-five minutes from the capital.

Guanajuato figured mightily in Mexico's struggle for independence from Spain 200 years ago, and evidence of its prolific mining history, which was recognized by UNESCO, remains abundant, with large mines remaining active. Indeed, mining comprises roughly 6.0% of the Guanajuato's economy (Cabrejos Moreno 2008), yet the city's principal asset for visitors—its cultural heritage—may at times be ignored or treated casually by its tourism establishment.

Very little analysis can be found regarding tourism planning and strategy in Guanajuato, especially within the context of its World Heritage Status. In a recent article, one geographer observes that Guanajuato has struggled with its transition from an economy based on mineral extraction to tourism-based economy. The result is that Guanajuato's tourist promoters are "simultaneously selling 'existing aspects of the place,' trying to 'replace lost sources of wealth,' and attempting 'place branding'." The article concludes this "mix of strategies has not produced a coherent image" (Asch 2009, 2).

An architect and urbanist, who was also interviewed for this research, observes that this transformation from a mining city to a tourist city resulted in a transformation of Guanajuato's historic center into a district far more privileged than the remainder of the city, including its newer suburbs (Sánchez Martínez 2009, 89-93). As an example, the author cites the change in pavement and street furniture, noting that public officials claim such improvements offer improved cleanliness and lay the groundwork for a new tourist market, at the expense of tradition and identity. Figure 5-4 illustrates this strategy with a photo taken at the western limit of the repaving operation, near the Plaza de San Fernando (on Figure 3-9, the plaza with the fountain, directly below Cerro del Cuarto).

Another analysis echoed these views, noting that the strategy for consolidating the tourism function in Guanajuato's historic center has spurred economic activity there, to the detriment of other areas. This perspective, it was argued, neglects strategies for protecting built heritage and preserving the center as a living city (Hiriart Pardo 2009, 37).

A paucity of planning documents for Guanajuato's historic center and development of its tourism industry can be found on the Internet, and few were offered during several visits to the city. ICOMOS Mexicana prepared an analysis in 2005 that compared ten historic centers with respect to planning and regulation. It found two cities without an assessment plan or program for development of their historic centers: Guanajuato and Zacatecas (ICOMOS Mexicano 2005). The ICOMOS study noted then that Zacatecas was in the process of realizing such a plan. A 2003 document produced by the city of Guanajuato assembled a vast array of laws and plans pertaining to preservation of cultural heritage in all parts of the city into one 1,433-page document. The broader document includes the 1994 *Plan Parcial de Desarrollo Urbano, Zona de Monumentos de la Ciudad de Guanajuato*. It also notes that the *Plan Parcial* was never inscribed in the *Registro Público de la Propiedad* (literally, "public property registry") (City of Guanajuato 2003, 1-2). This is similarly reflected in a document from Mexico's federal agency for social development, SEDESOL, which notes that Guanajuato's *Plan Parcial* was approved by the municipal council, published in the local official journal, but never inscribed in the registry (Secretaría de Desarrollo Social 2008, 1).

A recent planning document from the city's tourist office highlights the weakness of their planning and strategies. In 444 words over five pages the document provides little detail, but nevertheless conveys plenty about the Guanajuato's lack of focus.

As strategies it offers the following: "Update the tourism inventory and create a data bank of photos, history, culture, articles, services, and statistics"<sup>2</sup> (Aguado Malacara 2009, 1). For new tourist products the document suggests a master plan for the city's

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<sup>2</sup> My translation.

reservoir and adjacent park, a sound and light show, an ecological/cultural park with equipment for fairs and shows, and a children's theme park. The document also advocates a range of events to be anchored to each month of the year. As examples it suggests international student festivals, a festival of wind instruments, sports competitions and exhibitions, events related to Guanajuato's Sister Cities, and a puppet festival.

The *Plan Municipal Para el Desarrollo Turístico de Guanajuato Capital* echoes the earlier comment with respect to the city's lack of cohesive image with respect to tourism. Given Guanajuato's history, its heritage, and its World Heritage status, one would expect the city's three-year plan for developing tourism to emphasize those aspects. To the contrary, the document makes no reference to the city's World Heritage status, instead advocating a diverse array of events having little or nothing to do with Guanajuato's unique selling proposition. Further, one might question the wisdom of proposing an ecological and cultural park that also includes facilities for fairs and shows—activities which appear to conflict. Likewise including puppet festivals appears either naïve or audacious. Mexico City recently experienced its eighth Festival Internacional Titerías (Festival Internacional Titerías, 1), and it would be difficult to imagine a demand for a similar event only a few hundred miles away. To its credit, however, the plan avoids the focus on Guanajuato's historic center, which, as noted, has drawn criticism.

Interviews with tourism officials confirm the previous observations. For example, one tourism official notes: "We are rich in heritage and culture, but as far as recreation we have nothing to offer. We have no theme parks, no parks. We must remember that,

for vacations, it is the children that generate the ideas as to where to go and who decide where the family goes. They come to Guanajuato, they get their fill of history and culture, and then they ask, 'Well, what else?' We are missing recreation."<sup>3</sup> Unique among Mexican World Heritage cities, Guanajuato's designated area extends beyond a central historic zone and includes surrounding mining communities. The December 1987 UNESCO Designation Report acknowledges that the city's "growth, the layout of its streets, including the picturesque 'subterranean' streets, its plazas, and the construction of hospitals, churches, convents and palaces are all inextricably linked with the industrial history of the region, which with the decline of the Potosi mines in the 18th century, became the world's leading silver extraction center" (International Council of Monuments and Sites 1988).

Unfortunately, efforts to produce recreational offerings and theme parks may conflict with preservation goals of UNESCO and others. With the depressed price of silver soon after 2000, nearby mining assets, which included vast tracts of land and historic communities, were sold by local mining cooperatives (Ferry 2005). Investors subsequently redeveloped the eighteenth-century Guadalupe Mine (also referred to as the "Elephant Mine," because of its multi-story stone exterior buttresses, see Figure 5-5) as a nine-hole golf course and club, with initial plans to build a nine-hole golf course, 100-room hotel, and twenty-one single family houses. Subsequent visits to this facility suggest it has not been particularly successful. During one glorious weekend in February 2009, a visit revealed the only players were the property's director and his golfing partner. As Figure 5-6 indicates, the facility also appears to have become

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<sup>3</sup> Mario Aguado Malacara (Guanajuato Director of Municipal Tourism), in discussion with author, January 2010. (Translation by Jane Ashley.)

somewhat neglected by that point. The putting greens were no longer green. This may reflect a sluggish economy, but it equally may demonstrate public rejection of a facility that appropriated heritage to badly address the desires of the target market, golfers from the United States and Canada, as well as the local market.

Still, development threatens less-populated parts of the UNESCO-designated area near Guanajuato, with or without tourists. One observer noted that the UNESCO World Heritage “declaration is symbolic...but the city is growing and growing and growing. Fifty percent of the area of the declaration of World Heritage is empty. We are worried about this area, this ecological area—open space surrounding the historical city.”<sup>4</sup> An unwisely located ecological park/fairgrounds or theme park, as proposed in Guanajuato’s 2009-12 tourism plan could threaten these already endangered areas.

Guanajuato has been served by an NGO, Guanajuato Patrimonio de la Humanidad, which was organized in 1989, soon after the city joined the World Heritage list. The organization has five objectives related to preservation of Guanajuato and adjacent mining communities:

- identify cultural heritage in the mining communities of Guanajuato state<sup>5</sup>; become involved with the cultural heritage of these communities—furnishings and/or property—because of their artistic value and/or risk of destruction;
- influence public policy to create an integrated management plan that will convert these communities into tourist sites and so secure the sustainability of their heritage and their development; and
- promote research and dissemination of the communities’ cultural heritage (Guanajuato Patrimonio de la Humanidad).

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<sup>4</sup> Manuel Sánchez Martínez (Professor of Architecture, University of Guanajuato), in discussion with author, January 2010.

<sup>5</sup> This includes Pozos, a former mining community near San Miguel de Allende, as well as towns that are closer to the city of Guanajuato

The organization's 2009 budget include 4.5 million Mexican pesos, with funding from SECTUR, the federal Ministry of Public Education (FOREMOBA), and a municipal organization established to fund investments in cultural heritage (FIDEPACULT) (Elizarraraz 2009). This amount is equivalent to \$313,696.

Having largely accomplished most of its goals in the interior in Guanajuato's historic center, Guanajuato Patrimonio de la Humanidad has now turned its attention to the other principal component of the World Heritage site formally known as the Historic Town of Guanajuato and Adjacent Mines. The effort involves eight mining communities within the municipality of Guanajuato: Mineral de La Luz, San Ignacio, Valenciana, Mineral de Santana, Santa Rosa de Lima, Monte de San Nicolás, Marfil, and Mineral de Cata. It includes four others elsewhere in the state of Guanajuato. Plans call for revising and publishing an out-of-print guide book describing various tourist routes in and around Guanajuato. Ultimately, a tourist route through these mining communities will help provide for their inhabitants, many of whom have suffered reduced incomes with reduced mining activity over years. The organization's approach is a holistic one. Its director notes, "We see the cultural, artistic, and economic development value in order to reach our goals. That is why we have developed the educational-heritage model for the restoration/education/employment of people."<sup>6</sup> In the case of the mining communities, Guanajuato Patrimonio de la Humanidad invests seed money in the community for restoring churches and other historic structures, as well as publishing thoughtful guides to otherwise seldom-visited, but historically relevant places. Once restored, the buildings are expected to attract tourists. In the organization's

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<sup>6</sup> Bertha L. Hernández Araujo (Director of Guanajuato Patrimonio de la Humanidad), in discussion with the author, January 2010. (Translation by Laura Lavernia.)

development model, community members initially will benefit from the tourists' arrival by establishing microbusinesses selling crafts, food, and refreshments. As the tourist route develops, such enterprises should likewise prosper and develop into more established enterprises.

Guanajuato Patrimonio de la Humanidad believes community involvement is central to success. The organization's founder notes, "It is also very important to have the community back the project. In certain instances, we have thought that this or that church needs restoration and we have not taken the people into account. They get upset and interpret what we are doing incorrectly. So now when we work, we put up a plaque that explains where the funds are coming from, who we are, and what the project entails. It is also important to explain the restoration process: what it is, and how it is done."<sup>7</sup>

Guanajuato's municipal government and private enterprise demonstrated a profound insensitivity to the local community when the Guadalupe Mine was converted into a nine-hole golf course and resort. There is clear evidence that such trends continue, even as Guanajuato Patrimonio de la Humanidad continues with its community-based approach to restoring historic assets in adjacent mining communities. During interviews in January 2010, there was occasional discussion about possible development in Mineral de la Luz, one of the more remote mining communities surrounding Guanajuato. Rumors circulated regarding investors from Ciudad Juárez and lengthy landing strips.

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<sup>7</sup> Enrique E. Arellano Hernández (founder of Guanajuato Patrimonio de la Humanidad), in discussion with the author, January 2010. (Translation by Laura Lavernia.)

A review of local newspapers revealed the mystery extended to a public level. Newspaper articles from spring 2009 suggested the nature of the future development and its investors would be disclosed in the future. The article notes, “In one month, a group of investors who maintain their anonymity will announce what comprises the Mineral de La Luz project, in which seventy laborers have been working since a year ago.”<sup>8</sup> It further notes, “The architect Alberto Hernández, in charge of work in an area of five hectares and is completely fenced, does not know if it will be a hotel, retirement home, nursing home or hospital, only that it is a great project that will impact the ecological development, water resources, and tourism in the municipalities of Silao and Guanajuato” (Ochoa 2009).

Searches of several newspapers revealed no announcement one month hence, although an article appeared more than a year later describing a future “subdivision with 700 green homes occupying 120 hectares (297 acres) near the community of Mineral de La Luz”<sup>9</sup> (Romero 2010a). The article does not identify the investors behind the project, although the project apparently is named Sierra Bonita. Attempts to interview the architect, Hernández, in early 2010 were met with statements that he knows nothing about the project.

No website or further references to Sierra Bonita could be retrieved from the Internet. A search on Craigslist, however, revealed a listing by a buyer’s broker who was advertising land for development in Mineral de La Luz.

Mineral de La Luz: An exciting new sustainable living project on 100 acres of gorgeous view property looking directly over the village church and el

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<sup>8</sup> My translation.

<sup>9</sup> My translation.

Gigante, the highest peak in Central Guanajuato. The project includes a common tree-filled green area with springs and a waterfall, an original Pantheon dedicated as a park, soccer and baseball fields donated to the village, and original mine wells with ruins. There are water holes fed by springs on most parcels. Access roads are in, electric and telephone hookups are available; the main access highway is near to all lots. Parcels vary in size from 2,000 to 27,000 M2 and can be sized to fit a buyer's plans. Prices vary from 50 to 120 Pesos per M2 depending on size, views and location. Absolutely beautiful! (Cragislist)

Email and telephone inquiries to the advertiser provided further information, including lots platted over a Google Earth® image. Figure 5-7 reproduces one such image and highlights the vast extent of the project in relationship to the tiny remnant of the mining community.

Recent experience suggests Guanajuato's political and business establishment often operates with a set of strategies and objectives that effectively conflict with the objectives and tactics of the city's principal preservation organization and often neglect to involve affected communities. Guanajuato's mining communities have their own patrimony developed over many centuries.<sup>10</sup> The recent development projects at the Guadalupe Mine and Mineral de La Luz clumsily attempt to merge real heritage into a heritage product and in doing so turn a place with a real history and a real heritage into a kind of hybrid setting, much as was described by Cohen, Foucault, and others.

As noted previously, one analysis noted that in Mexico, World Heritage sites "that lie along a tourist route witness the largest increase in international visitors" (van der Aa, Bart Johannes Maria 2005). This realistic observation has multiple implications for Guanajuato. One hotelier and former mayor (*alcalde*) commented on how Guanajuato fails to profit from its proximity to other World Heritage sites. He notes that the State of

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<sup>10</sup> The patrimony of Guanajuato's silver mining community is amply discussed in *Not Ours Alone: Patrimony, Value, and Collectivity in Contemporary México* by Elizabeth Emma Ferry.

Guanajuato is the only Mexican state with two World Heritage cities (Guanajuato and San Miguel de Allende) “. . .and they are different.” Noting the need to develop links between Guanajuato and the neighboring World Heritage city, which in recent years has attracted more affluent visitors, he continues: “We need to work with the differences between San Miguel and Guanajuato” and encourage tourism to both cities.<sup>11</sup>

Proximity to San Miguel de Allende may be able to provide more visitors, but the short duration of visits limits economic impact on the city. “We are so close to the other cities that tourists come just for the day. It happens the same with Toledo and Madrid. People from Madrid go in the morning, visit the city, have lunch there, and they go back to Madrid.”<sup>12</sup> It has been noted that “historic cities close to great metropolises” experience a high frequency of *excursionistas*, who come and go within the same day (Cabrales Barajas 2005, 35-36). The situation reflects a phenomenon described by Antonio Paolo Russo, who observes that the horde of day-trippers is “less elastic with respect to quality,” and much more sensitive to prices. Extreme examples of this produce “a process of ‘McDonaldization’” (Russo 2002, 170).

Given the intimate layout of Guanajuato’s historic center, with narrow streets incapable of handling anything larger than a small bus, visits by day-tripping tour buses are constrained by access and the need for transfers to smaller vehicles. Large hotels with more expansive parking facilities, such as the Holiday Inn<sup>®</sup>, are located on the fringes of Guanajuato. Such lodging would likewise be more attractive to visiting

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<sup>11</sup> Arnulfo Vázquez Nieto (former mayor and owner of El Mesón de los Poetas Hotel), in discussion with author, January 2010. (Translation by Jane Ashley.)

<sup>12</sup> Clarisa A. de Abascal (Manager of Viajes Georama and former tourism official), in discussion with author, January 2010.

motorists who may be daunted by the confusing and often subterranean road network in the core of this city.

Data for 2009 provided by SECTUR indicate the average foreign visitor remained in Guanajuato for 2.0 nights, up from 1.8 nights in 2005. The results for the seven World Heritage cities for 2009 are remarkably similar, with foreign visitors to Oaxaca, Puebla, and Querétaro likewise spending 2.0 nights on average. The three outliers were Campeche, Morelia, and Zacatecas, with foreign visitors spending an average 1.2, 1.4, and 2.3 nights per visit, respectively. With respect to the relationship between San Miguel de Allende and Guanajuato, it should be noted that in 2009 visitors to the former remained for an average 2.9 nights per visit. One might conclude that North American visitors might use this “richer, more attractive town” as a base for visiting neighboring cities, such as Guanajuato, as was recommended in an August 2010 travel article (Kandell 2010).

Tourist routes are also important on a local level. The effort of Guanajuato Patrimonio de la Humanidad to restore nearby mining pueblos and create a tourism circuit to explore them creates new synergies with existing and well-known tourist attractions and provides justification for visitors to stay longer in Guanajuato. It has been suggested that projects that solely contribute to the public image, such as lighting and signage, “don’t contribute directly to the lifestyle of the people who live in these local mining communities. Where we see the impact is when they will be able to include these communities in the tourist routes.”<sup>13</sup>

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<sup>13</sup> Jorge Cabrejos Moreno (Professor at Universidad de Guanajuato), in discussion with author, January 2010. (Translation by Jane Ashley.)

Guanajuato's 2009-2012 Tourism Development Plan lacks any references to restoration of the mining communities or any aspect of the local population. Instead, it focuses on promoting new products such as sound and light shows adjoining the city's principal monuments, theme parks, and eco-parks designed to accommodate fairs and shows (Aguado Malacara 2009, 1-2). Interestingly, the government plan submitted by the administration of incoming PRI mayor Nicéforo Guerrero Reynoso, in its broader *Plan de Gobierno Municipal de Guanajuato: 2009-2012*, goes far beyond the plan provided by the city's municipal tourism director. The broader document for one, pays lip service to the need to develop *sustainable* tourism, citing the following as its objective under that category: "Planning, fostering, and coordinating Guanajuato's tourist development and realizing strategies for achieving a globally integrated product, sustainable and competitive, that increases tourist flows, their stays, and generates employees" (Ayuntamiento de Guanajuato 2009, 80). It also advocates creating an advisory board comprised of the private sector, citizens, and government, and a tourist zone for the mining pueblos and adjacent mines.

Local critics take issue with the general focus of tourism development efforts. One critic notes, "This theme connects with that of globalization. The historical center has become a product to sell. They are simply using the city as a beautiful backdrop. They sell the city as scenery for events. It's not so much for the people."<sup>14</sup> This was confirmed by comments from the former Assistant Secretary of Tourism Development for the State of Guanajuato, who indicated that Guanajuato's World Heritage status was deployed only selectively in their marketing efforts. He noted their principal marketing thrust was

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<sup>14</sup> Cabrejos Moreno, discussion.

toward younger people with more disposable income.<sup>15</sup> Newer marketing materials (in 2007) emphasized emotional aspects and downplayed the region's history. Brochures showed fit and attractive young visitors, often in romantic situations surrounded by sumptuous food and gorgeous flowers. In such publications, one occasionally may find historic structures as background settings. Figure 5-8 provides an example of such printed material. The young couple is depicted frolicking before a ruin in one of the State of Guanajuato's many depopulated small mining communities. The focus here is on fun; not on understanding the cultural or historical context of these structures.

A recent news article indicates tourism officials of various levels participating in community meetings prior to developing a tourist route to the mining pueblos adjacent to Guanajuato. The article provides encouraging news that a tourist route through the mining communities is being planned and that local communities are apparently being consulted in the early stages of planning. On the other hand, a quote from Guanajuato's Director of Tourism betrays a weakness toward globalization, which could, in turn, threaten the "placeness" of these communities. Said Mario Aguado Malacara, "We began this analysis so that in the future these mining communities can be integrated into a global Guanajuato tourism product (Romero 2010b).

### **Branding and Slogans**

Create a slogan. That summarizes Guanajuato's tourism strategy according to many of those interviewed. "First we select an image—the former one was "City of Romance," then from that you develop the strategy; then you put together the blitz," said

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<sup>15</sup> Salvador Ayala Ortega (Secretary of Economic Development, Guanajuato), in discussion with author, August 2007.

a city tourism official.<sup>16</sup> As noted previously, UNESCO and its agents initially ignored tourism issues. Subsequent efforts, such as UNESCO's Sustainable Tourism Program focus more on minimizing the adverse effects of tourism on cultural heritage. Five of the 163 pages in UNESCO's Operational Guidelines (UNESCO, Intergovernmental Committee for the Protection of the World Cultural and Natural Heritage 2008, 1-2) refer to rules for the use of the World Heritage emblem. Anthropologist Michael Di Giovine argues the emblem essentially is the World Heritage brand (Di Giovine 2009).

Stephen Boyd and Dallen Timothy write that the branding is particularly relevant to World Heritage sites with respect to positioning and image. The former "refers to what a brand stands for in the minds of its customers and prospects, relative to its competition, in terms of benefits and promises." The concept of "image," is "generally synonymous with the reputation of the brand" (Boyd and Timothy 2006, 56-68). With respect to the World Heritage emblem, the authors argue that its overemphasis works to endanger visitor recognition of other worthwhile experiences near World Heritage sites.

The concept of branding a World Heritage Site or World Heritage city may be more complicated than that. Writing about branding as it pertains to architecture, Anna Klingmann suggests that branding for a more permanent product such as architecture (or World Heritage cities) is different and "more pertinent," given the diverse range of alternative distractions. She argues that branding is a way of transforming the sensation of a subject, creating a "catalyst that enhances the perceived value of its user by endowing him or her with a particular identity and by triggering a particular brand experience" (Klingmann 2007).

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<sup>16</sup> Aguado Malacara, discussion.

Guanajuato's tourism managers understand the city's basic allure as culture and history, mummies, and monuments. Observation and research suggest the city's tourism promotion model has led to a proliferation of often disconnected and obscure slogans and campaigns. Far from overplaying Guanajuato's World Heritage hand, the myriad slogans appear to ignore it, while simultaneously creating a diffuse identity for Guanajuato as a destination. Recent slogans include the following:<sup>17</sup>

- *City of Lights;*
- *Cervantino Capital of Mexico;*
- *City of Romance;*
- *City of Legends;*
- *Your Experience Becomes History; and*
- *Cradle of Independence.*

Local observers, including former *alcalde* Arnulfo Vasquez Nieto, indicated sloganeering has become a prominent strategy because mayors cannot serve for more than one three-year term.<sup>18</sup> Multiple terms are permitted, but not in succession. Such short terms of office prohibit development and execution of meaningful tourism plans and strategies. Furthermore, tourism promotion staffs tend to turn over with every change of administration. Consequently, in lieu of meaningful long-term planning and strategy, tourism promotion relies heavily on slogans, with questionable results. Multiple slogans blur the city's brand and confuse potential visitors. He notes, "Other states have defined images that they promote with descriptive slogans, Michoacán, for example. But Guanajuato has never really gotten its image organized in this way."

Guanajuato's tourism managers, recognizing their lack of focus, contemplate implementing a uniform brand. Mario Aguado Malacara commented, "I am looking for a

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<sup>17</sup> My translation.

<sup>18</sup> Vasquez Nieto, discussion.

good slogan that will permanently be associated with Guanajuato. For example, San Miguel de Allende is 'The Heart of Mexico,' Michoacán, 'The Soul of Mexico.' I am currently proposing that we call Guanajuato, because of its rich heritage, rich culture, 'The Pride of Mexico.'<sup>19</sup>

Guanajuato's former *alcalde*, elaborating in a piece for the Organization of World Heritage cities, suggests that a lack of focus on cultural heritage with World Heritage cities is mistaken. "The preservation of culture," he writes, "ought to be the prime element in support of our tourism. In this era of constant, rapid, and uniform change in the world, it is import to keep elements that lend identity to our cities, from a living heritage different from others in the world and unique in its context." While most agree that tourism "revitalizes economic life of cities," Arnulfo Vasquez Nieto argues that disorganized tourism may threaten cities. He notes, "This threat involves not only the physical deterioration of heritage sites, but also an infringement of meaning and identity" (Nieto).

The dangerous lack of focus that Guanajuato's former *alcalde* discusses is exemplified by the chaotic tactic of relying on a changing array of slogans. Having become aware that such disorganization, if not harmful, at least has not proven helpful, Guanajuato's tourism promoters are lurching toward a more consistent strategy, apparently without seriously considering the meaning of their more uniform slogan.

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<sup>19</sup> Aguado Malacara, discussion.

## Political Issues

We have already witnessed how public and private investors have worked together in Guanajuato's adjacent mining communities to redevelop historic sites and landscapes in ways that compromise their cultural heritage. Mexico has a relatively long history of public-private partnerships for tourism development, and this likewise extends to cultural heritage properties that can be exploited as tourism destinations. A recent work on the development of Mexican resorts in Baja California contends, "Much of the history of tourism in Mexico reveals the collusion between political and economic interests, as well as bloated profit projections, inept planning, social dislocation, and harm to the environment. It is an old story, perhaps best captured in the presidential regimes of Miguel Alemán Valdés (1946-52) and Luis Echeverría (1970-76)" (Saragoza 2010, 295-296). The same work notes that in the Vicente Fox era (2000-2006), and more recently, the role of the private sector has increased.

Guanajuato Patrimonio de la Humanidad views itself as a counterweight to political ineffectiveness. "All the (governmental) agencies have a more myopic view. Because we are a fundraising organization, we take all of their perspectives in mind. We see the cultural, artistic, economic development value in order to reach our goals."<sup>20</sup>

Another advantage of the NGO approach is the greater ability to use resources from private donors and foundations. One source noted that private sources of money avoid the ebbs and flows that come with changing federal, state, and municipal administrations and policies.<sup>21</sup> Such situation was described thus: "A major problem we

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<sup>20</sup> Hernández Araujo, discussion.

<sup>21</sup> Cabrejos Moreno, discussion.

have is every few years you have a change, you have a political party that takes the power...so in the last ten years we had PRI, PAN, the PRD.<sup>22</sup>

An official of Guanajuato Patrimonio de la Humanidad stressed that the situation is perhaps not exclusive to Guanajuato, but is rampant across Mexico, given its top-down governmental structure: “In Mexico, it’s very, very important who is in power. In other countries there is more of a community. Here it depends so much about personal interests. This can affect the amount of support available.”<sup>23</sup>

This was reflected in the early part of this decade with what has been termed the “Fox Effect.” Vicente Fox, a native of the state of Guanajuato and former Governor was elected president in 2000. Prior to that period, during Fox’s years as Guanajuato’s Governor, there was enormous interest in the politician who successfully ejected the ruling PRI after it and its antecedents had been in power for eighty years (Institutional Revolutionary Party). According to the state of Guanajuato’s former Director of Tourism, in charge at that time, as the prospect of a Fox presidency became more imminent, “everyone was coming down because he was saying that Guanajuato was *tierra de la oportunidad*, the land of opportunity. People from the *New York Times*, from Washington, and God knows what were coming down to see Fox. There were all kinds of people coming and going. That doesn’t mean they would have necessarily filled up the whole thing. The fact of the matter is there is a Fox Effect. The value that Vicente Fox—the first real change in Mexican politics in seventy or eighty years—his own personality, his own characteristics, his stature. It’s the first time that the President of

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<sup>22</sup> Sánchez Martínez, discussion.

<sup>23</sup> Hernández Araujo, discussion.

the United States had to look up to the President of Mexico and not look down at him. Guanajuato was having a boom time. Tourism was on the up and up.”<sup>24</sup>

The “Fox Effect” is an intriguing notion. It is entirely possible that the increased attention from foreigners, coupled with increased local investment, help visitor levels to spike in the capital of the state of Guanajuato during the late 1990s. As we have seen, the statistics indicate that Guanajuato suffered serious declines in foreign visitors after Fox took the reins as President in 2000. Figure 5-9 compares foreign visitor arrivals to the two cities in the State of Guanajuato for which series of data are available, Guanajuato and San Miguel de Allende (data are available for Celaya, another city in the state of Guanajuato, since only 2007). The graph indeed shows both cities experiencing increases during the Fox years. As we witnessed in Chapter 3, the seven World Heritage cities under scrutiny here achieved increases during the period. Interestingly, after Fox became President in 2000, Guanajuato saw international visitor levels decline precipitously, while San Miguel de Allende generally witnessed increased foreign arrivals until 2004. After Fox left office in 2006, both cities experienced remarkable declines in international visitors. Maybe that is the real Fox Effect.

In 1995, Guanajuato became the seat of the regional Secretariat of the Organization of World Heritage Cities, which helped the city attract government funding and attention. According to one source, this status—combined with Guanajuato’s position as one of Mexico’s first World Heritage cities and capital of the state of the same name—helped the city achieve \$100 million (US) from the State government in

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<sup>24</sup> Desmond J. O’Shaughnessy Doyle (former head of the State of Guanajuato’s Tourism Department), in discussion with author, January 2010.

2006.<sup>25</sup> Many in Guanajuato note that this umbrella organization fled Guanajuato that same year, subsequently leaving a vacuum in terms of prestige, visibility, and funding. One of the city's former mayors notes that the then-mayor of Guanajuato, Eduardo Romero Hicks, ignored the importance of this organization, although he was head of the Mexico's National Association of World Heritage Cities (ANCMPPM) (Ochoa and Martin Diego 2008). Rafael Villagómez Mapes, an architect who served two terms as *alcalde* from 1983 to 1985 and from 2000 to 2003 (Instituto Nacional para el Federalismo y el Desarrollo Municipal [INAFED], 21), noted that the Organization of World Heritage cities was able to channel resources through the central office for the Americas, then in Guanajuato. He also said the many meetings they had "promoted the cities; they filled the hotel rooms."<sup>26</sup> He also noted, "When I was mayor from 2000-2003, I think the years that Guanajuato was the head of the World Heritage cities was one of the best times."

With the departure of the Organization of World Heritage cities, Guanajuato developed a strategy of building "Sister Cities" relationships as a substitute.<sup>27</sup> A newspaper article from August 2010 describes an upcoming three-day visit to Sister City Morgantown, WV, for the city's Mayor Nicéforo Guerrero Reynoso and a contingent of six other officials. The trip was to be followed by a subsequent four-day stop in New York City, which is not one of Guanajuato's Sister Cities (Ochoa 2010b). An article from the next day's newspaper offered some details regarding the visit's agenda, citing six appointments with organizations and officials in Morgantown, and a meeting with the

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<sup>25</sup> Cabrejos Moreno, discussion.

<sup>26</sup> Rafael Villagomez Mapes (former Mayor of Guanajuato), in discussion with author, January 2010. (Translation by Laura Lavernia.)

<sup>27</sup> Cabrejos Moreno, discussion.

director of NYC & Company, New York City's promotional organization (Ochoa 2010a). A search of NYC & Company's website (<http://www.nycgo.com/>) and Google produced no evidence of such a meeting.

The point here is not to highlight municipal corruption, but to suggest a contrast between a program that regularly brought contingents of foreign officials with its ostensible replacement, which although it may promise to bring delegations from its sixteen Sister Cities to Guanajuato, also provides the potential for costly junkets to the United States (Morgantown and Ashland, Oregon), Latin America, and Europe.

### **The Cervantino Festival**

People who were interviewed identified other policies and issues influencing the apparent 43.2% decline in international visitors to Guanajuato between 2000 and 2008. The city's principal cultural event is the city's annual Cervantino Festival (Festival Internacional Cervantino or FIC). The three-week festival of music, dance, and art began in 1972, although it had a number of antecedents, beginning in 1953 (Vela 2002, 113). The festival has attracted world-famous talent including such artists and performers as Robert Mapplethorpe, Rudolph Nureyev, the Vienna Philharmonic, and Ella Fitzgerald. The international festival attracted increasing numbers of visitors from around the world; however, it also became attractive to a younger Mexican audience craving a party scene. According to many sources, in 2000 this situation reached an unpleasant climax with vast numbers of drunken young revelers. "The Cervantino Festival has suffered because of its success," noted the city's tourism director. "In a sense there were a lot of visitors that were not planned for. A lot of young visitors changed the festival around the year 2000. Guanajuato had then become a large

*cantina.*"<sup>28</sup> Going forward, FIC's budget was cut and its program modified to provide more regional emphasis and fewer internationally recognized performers and artists.

Further, events were split between Guanajuato and an annually rotating partner city in Mexico, and partner countries were chosen to provide performers. "From 2000 there entered a different system where the festival became somewhat privatized. The chosen state and chosen country were responsible for providing the events to represent themselves rather than have an organization here that contracted performers directly. From this period, the chosen state would pay its own costs. For example, China might send five events and three would be of good quality and the other two not so much. The Mexican states wouldn't be sending events of as good quality as previously. There also would be more quantity of local events than of international ones and so gradually the festival has become less international."<sup>29</sup> Given the Cervantino Festival's drawing power, some speculate that the festival's reformulation was responsible for the decline in international arrivals to Guanajuato.

Multiple requests to festival management have produced promises of historic attendance numbers, but no statistics materialized. A 2008 newspaper article, which followed that year's festival, provides some details (*Milenio*, November 15, 2008). The twenty-fifth anniversary FIC had 924,174 attendees. Ten years later, that number had dropped 39.5%, to 559,553. Another 31.4% fall occurred in 2008, leaving FIC with 384,046 attendees. The tourism disaster driven by economic meltdown, an influenza outbreak that started in Mexico, and increased fear of drug-related violence contributed to a 69.8 decline in Cervantino attendance in 2009.

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<sup>28</sup> Aguado Malacara, discussion.

<sup>29</sup> Cabrejos Moreno, discussion.

According to SECTUR data, mean foreign tourist arrivals as a percent of total arrivals between 1986 and 2008 was 9.0%. When that percentage is applied to the 364,620 decline in Cervantino attendance between 1997 and 2007, a net decline of 32,816 foreign attendees is implied. This implied decline in attendees at FIC dwarfs the 11,805 decline in annual foreign arrivals to Guanajuato between 1997 and 2007. Such declines in foreign arrivals to Guanajuato, however, are not beyond reason. Ignoring the anomaly of 2009, from the peak in 2000 to the nadir in 2003, international arrivals to Guanajuato fell by 32,658 visitors.

Interestingly, the foreign share of annual total arrivals to Guanajuato, as reported by SECTUR, increased from 6.9% in 1986 to 13.2% in 2000. This proportion plummeted to 8.0% in 2001 and remained at around that level between that year and 2008. (The mean 2001-2008 share of international visitors was 8.1%, in comparison with 12.5% during the four preceding years, 1987-2000.)

SECTUR data reveal a 3,737 drop in international arrivals to Guanajuato between October 2000 and October 2001, which represents a 63.5% decline, but addresses only 14.9% of the total annual decline between 2000 and 2001 as reported by SECTUR. (For comparison, if the decline were spread equally over twelve months, October's share would have been 2,094, or 8.3%.) International arrival statistics provided by Grupo Aeroportuario del Pacifico (GAP), the operator of Aeropuerto del Bajío, which serves Guanajuato, and surrounding areas, indicate a decline of 6,191 passengers from 2000 to 2001. (This reflects a decline in passengers arriving on international flights, and thus includes Mexicans as well as non-Mexicans.) Even if 100% of this decline were attributable to changes in the Cervantino Festival, the reduction would only account for

24.6% of the 25,130 total annual drop in international visitors arriving in Guanajuato, according to SECTUR data.

There appears to be little correlation between foreign tourist arrivals, as reported by SECTUR, and international arrivals, as reported by GAP. In part, this can be explained by the GAP data counting all passengers arriving on international flights—of all nationalities. Likewise, the Aeropuerto del Bajío serves a number of large cities, including the large industrial city of Leon, with 1.3 million inhabitants, and the State of Guanajuato's other World Heritage city, San Miguel de Allende (INEGI). Such considerations thwart solid conclusions regarding Guanajuato visitors based on international arrival data for Aeropuerto del Bajío.

In summary, while many claim the post-2000 decline of the Cervantino Festival as the principal cause of a general decline in international visitors to Guanajuato, and data would appear to suggest to most reasonable observers that the festival's change in format and subsequent decline in attendees, the evidence, while compelling, is not ironclad.

### **Data Issues**

Data distortions loom as an issue for analyzing post-2000 international visitor flows to Guanajuato. The major problem arises from a 2% tax on hotels and restaurants that was implemented in 2000. This tax was dedicated to funding tourism promotion efforts for Guanajuato. The basic quandary was articulated by Desmond J. O'Shaughnessy Doyle, a former tourism official with the State of Guanajuato, whose office was responsible for collecting such data. It was echoed by other former officials.

"Of course, if you are going to be paying taxes on the number of rooms that you have sold then you're going to be careful about how many you are going to report. The

2% tax is based on the number of rooms occupied, but the question is: 'Are you getting the real picture about the number of rooms that are occupied in a given hotel.'"<sup>30</sup>

Subsequent conversations with Doyle's former counterpart in Morelia reveal that a similar tax was imposed there with, what we have seen, were completely different results with respect to tourism flows. Indeed, a 2004 paper on Mexican tax policy (Sobarzo 2004) reported twenty-seven of Mexico's thirty-two entities (thirty-one states plus the Federal District) then had tourism taxes, such as Guanajuato's.

According to Doyle, state tourism officials traditionally collect hotel arrival and occupancy data with daily telephone inquiries. The financial incentive to under-report arrivals was already noted. The method, however, introduces other biases that may inhibit comparisons among destinations or across time. For example, lodging in some cities may be dominated by guest houses or bed and breakfasts, which would not be counted by these daily telephone surveys. Likewise, when cities increase available lodging by converting single-family houses to guest houses or bed and breakfasts (a common practice in Mexican World Heritage cities), that additional capacity would be excluded from visitor counts.

As Doyle notes, "Data can be really, really good in Mexico. They can also be so distorted and so twisted around." This brings us back to the enduring problem faced by others who have attempted to identify and quantify the relationship between World Heritage inscription and tourism, with mixed or little success: the lack of consistent and valid data. In the case of Mexico, SECTUR provides an abundance of data reaching back to 1986. The overall impression from speaking with dozens of hoteliers,

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<sup>30</sup> Doyle, discussion.

government officials, and academics is these numbers are reliable—especially for foreign tourists. Given their data collection method, they may not represent the entire universe of visitors; however, they provide an adequate basis for the purposes of this research, investigating trends. One must constantly remember that the numbers are, at minimum, indication, but they may not tell the whole story.

### **Morelia**

We have examined statistics for international visitors to Mexican World Heritage cities and discovered these places generally experienced statistically significant increases in international visitors as a direct result of their inscription on the World Heritage list. We also observed that nine to twelve years after inscription, the ability of these cities to retain or increase international visitors became highly variable.

In the case of Guanajuato, further investigation of this case revealed two principal drivers for that city's decline in international visitors after 2000. The first was an over-reliance a single annual event, the Cervantino Festival, to draw visitors. This event was poorly managed and, under control of the Federal Government, became more diversified. With events and activities occurring in other cities, Cervantino was weakened as was Guanajuato's image. The second major driver for Guanajuato's hemorrhage of international arrivals was the city's lack of focus with respect to planning and to tourism development. Guanajuato was always a major tourist destination in Mexico, but in marketing parlance, the brand became muddled. The Guanajuatenses could describe the "unique selling proposition" of the place, but the history of its planning and promotion betrays an inconsistency.

In turning our focus to Morelia, we will consider how that city compared with Guanajuato in the above respects. We will investigate why its international visitor levels grew.

From a methodological perspective, it should be noted that Morelia's success has been widely documented in numerous sources. (Cabrales Barajas 2005; Hiriart Pardo 2006; Hiriart Pardo 2009; Mercado López 2009, etc.) In the case of Guanajuato, little has been written. Most likely the explanation for this boils down to transparency issues. Given Mexico's authoritarian political culture, corporate and government officials are unwilling to risk embarrassment to themselves and their superiors by sharing potentially embarrassing information. Furthermore, with the tentative job security of Guanajuato's municipal officials, who endure vast changes every three years with incoming mayoral administrations, this situation may be compounded. When there are bad-news stories, as apparently was the case with the Cervantino Festival, information becomes protected and transparency is minimized.

In contrast, Morelia is well-documented as a World Heritage tourism success story. Multiple books on the subject (Foro Sobre el Centro Histórico de Morelia, Azevedo Salomao, and Universidad Michoacana Coordinación de la Investigación Científica 2004; Ramírez Romero 2004) as well as numerous journal articles provide detail and analysis of the subject. The obvious research challenge here becomes identifying and isolating the drivers of this success and understanding aspects of the city's personality and behavior that enabled that outcome. On the other hand, one cannot exclude the possibility that Morelia's "success story" indeed may have effectively

evolved into the status of a meme constructed by the Morelia's proud preservationists and promoters or evolving from preservationist folklore.

### **Planning and Strategy**

Three critical planning documents contributed to the success of Morelia's historic center. The first was a succinct three-step program (in six pages), *Plan Maestro Para el Rescate del Centro Histórico de Morelia*, which was authored by Dr. Enrique Villicaña Palomares, a journalist, planner, attorney, and educator.<sup>31</sup> The second was a more detailed planning document, *Programa Parcial*<sup>32</sup> *de Desarrollo Urbano del Centro Histórico de Morelia*, from November 2001. The third was *Plan de Reestructuración Turístico de la Ciudad de Morelia* (*Restructuring Plan for Tourism of the City of Morelia*), which was prepared by IDT, the Mexican subsidiary of the Spanish consultancy DIT, and dated October 2001.

### **Plan Maestro Para el Rescate del Centro Histórico de Morelia**

The three steps of the May 18, 1999, "Rescue Plan for the Historic Plan of Morelia" were as follows:<sup>33</sup>

- relocate many government functions located in the historic center;
- relocate the city's principal bus station to a satellite location; and
- relocate street vendors (so-called informal commerce) from Morelia's historic center (Villicaña Palomares, 6).

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<sup>31</sup> Villicaña was found executed on April 10, 2010. He had been kidnapped during the previous week, a ransom had been paid by his family, but his corpse was found with knife wounds to the neck and collar bone and a crushed skull. A kitchen knife and stone were found beside him (Díaz 2010).

<sup>32</sup> "*Parcial*" refers to the narrowly defined focus of the plan on Morelia's historic center, as opposed to a plan governing the city as an entity.

<sup>33</sup> My translation.

While any of these activities by themselves would be a major undertaking, accomplishing all three reflects a substantial political will and management capability. The new Morelia Bus Terminal began operation in October 2001, eliminating 1,250 daily departures from the former Generalísimo Morelos Terminal, in the historic center and freeing up 3.7 acres (1.5 hectares) for other uses, such as parking or a tourist “welcome center.”

The last step of the plan appears to be the most-cited benefit of *Plan Maestro Para el Rescate del Centro Histórico de Morelia*. After much negotiation and work with vendors and the community, 1,500 street peddlers or *ambulantes* were relocated on June 5, 2001. The significance of this is highlighted by remarks from a Regional Vice-President of the National Steering Committee of ICOMOS Mexicano and Coordinator of the Scientific Committee of ICOMOS Cultural Tourism Mexico. Informal commerce “was a big, big problem. It was a ‘permanent’ effect. Ten years after the nomination, the problem was taking all the public spaces. You could not see public spaces. They [the peddlers] lived there and in some places you could not walk because the place was full of informal commerce.”<sup>34</sup>

The gravity of this problem and the impact of relocating informal commerce are illustrated on Figures 5-10 and 5-11, which depict before-and-after images of Plaza San Francisco in Morelia’s historic center. The city identified 1,697 itinerant businesses in the historic center, including 180 in Plaza San Francisco. Cabrales Barajas, citing other sources, including university research and newspaper reports, counted 2,000 and 2,480 commercial units ( 2005, 42). The author makes note of carefully articulated planning

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<sup>34</sup> Carlos Alberto Hiriart Pardo (Professor, Universidad Michoacana de San Nicolás de Hidalgo), in discussion with author, August 2010.

process which enabled the July 5, 2001, relocation to occur without violence. The effort involved multiple levels. Two markets had been developed to alternative fixed locations for itinerant merchants: “the San Juan Market with 400 stalls, and the Capuchins Market with 240. To prevent the return of the *ambulantes*, students were recruited to a new organization called Amigos del Rescate del Centro Histórico. Trained “in matters of first aid, tourism, public security, municipal regulations, and knowledge of traffic patterns, they patrolled the streets during six months as vigilantes and citizen informants, in exchange for which they received a grant and their university accepted the same as the obligatory social service component (ibid. 46).” Additionally, a program called Vive el Centro Histórico was implemented to provide regular entertainment, athletic, and cultural events in public spaces that were formerly overrun with street peddlers (ibid., 44-46).

### **Programa Parcial de Desarrollo Urbano del Centro Histórico de Morelia**

Complementing the Plan Maestro Para el Rescate del Centro Histórico de Morelia was another document which appeared six months later. The Programa Parcial de Desarrollo Urbano del Centro Histórico de Morelia, Michoacán went beyond the minimal Plan Maestro by performing a diagnostic analysis of the prevailing environment and devising plans that would rapidly address identified deficiencies. As was noted previously, a recent document from ICOMOS Mexicano notes that Guanajuato does not have an approved plan or programa parcial.

The general objectives of the Morelia program can be summarized as follows (Ayuntamiento de Morelia 2001, 93-94):<sup>35</sup>

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<sup>35</sup>My translation.

- orient citizen participation toward the protection of natural, cultural, and built heritage;
- make the conservation of heritage buildings in the historic center a paramount interest;
- implement support and stimulus for conservation and maintenance of heritage buildings;
- discourage change and in use from living space to commercial space so as to preserve the residential character of neighborhoods;
- prioritize resources in the municipal budgets and promote state investment in the care and preservation of public spaces in wooded areas in the historic center;
- dedicate stimulus and support to the institutional relationship between local, state, and federal levels to achieve adequate coordination;
- stimulate all actions that conserve the customs, traditions, and festivals related to the culture of the historic center;
- rearrange informal commerce;
- encourage judicial, administrative, and financial instruments for improving public spaces and the urban image;
- induce improvement of living by way of programs that integrate public, private, and social sectors;
- promote restructuring of transport lines;
- lessen concentration of public offices to improve function of the road network;
- encourage all actions tending to improve the natural, cultural, and built heritage of the historic center;
- support rational land use of the historic center, particularly with abandoned and deteriorated buildings;
- encourage relocation of industrial activities north of the historic center;
- stimulate the residential character of neighborhoods with basic services; and
- encourage growth of pedestrian activity in the historic center.

The program provides thirty-eight more specific objectives addressing issues such as land use, transportation, public spaces, cultural heritage, and the urban image.

Interestingly, while the diagnostic portion of the Programa considers tourism among the many aspects considered in the diagnostic analysis, it is not addressed, except perhaps obliquely, in the list of prescriptive objectives. The numerous measures designed to improve the ambience of the historic center certainly would make it a more appealing tourist destination. Two explanations come to mind for this apparent lapse. First, Morelia was at a crossroads in 2001, having just witnessed an economic upheaval of sorts connected with an overnight makeover of its historic center. Second, tourism was simultaneously covered by the Plan de Reestructuración Turístico de la Ciudad de Morelia (Restructuring Plan for Tourism of the City of Morelia), which was prepared by the Spanish tourism consulting firm DIT Global and its Mexican subsidiary IDT and published in October 2001. In large measure, the thirty-eight prescriptions have been enforced, vastly improving the character of Morelia's historic center. There are, however, some notable exceptions. Many objectives concerned a restructuring of the city's mass transit system, which relies on minibuses (known as colectivos or combis). Given prevailing demand levels, their small size necessitates frequent service, which in turn results in severe congestion and pollution in the historic center. The Plan Parcial indicates 1,342 such vehicles were operating in Morelia in 2001. The diagnostic portion of the Programa Parcial noted that Avenida Madero, the Morelia's principal east-west route through the historic center, had nineteen to twenty routes with minibuses, minibuses, and buses (Ayuntamiento de Morelia 2001, 47). Ten other east-west and north-south corridors also accommodated more than ten transit routes. The combined effect results in major intersections in the heart of the historic center experiencing the convergence of as many as thirty-nine different routes. The Plan Parcial notes also that

the lack of fixed and marked bus stops generates a large component of the problem (52).

A visit to Morelia's historic center quickly reveals that the problems identified in 2001 endure to this day. Figure 5-12 illustrates typical effects of reliance on frequent small vehicles for public transport. Bus stop signs were clearly visible, however, colectivos also appeared to stop on demand. Among the more significant issues identified by the Plan Parcial—street vendors, trash, signs and billboard, and parking, public transit remains the most intractable. Progress has been made with respect to parking. The site of the former bus station on the northeast corner of the historic center will provide 740 parking spaces on three levels (Reyes 2010). Another facility is underway on the northeastern corner of Morelia's historic center, near the western end of the city's aqueduct. The proximity of the new garage has attracted the ire of preservationists who take issue with commercialization of Morelia's cultural heritage. Critics contend that the initial victories of the Plan Maestro gave way to corporate greed. "This soon became the real estate speculation, property values and rents rose. Various businesses were implemented which specifically focused on making the city a major tourist destination," complained one historian (Alba 2010). Heightened sensitivity surrounding the project has provoked attempts to mask the new facility (Figure 5-13).

The controversy highlights another problem. In its diagnostic portion, the Programa Parcial remarks on the historic center's trend toward depopulation. Figures provided demonstrate a total population decline of 12,421 inhabitants in the Zona de Monumentos and adjacent transition area, for a 22.7% decline—or 2.8% per year. The average annual rate of population decline in the Zona was 3.5% per year. An INAH

official noted, “In 200 square blocks of the old city, people stopped living there. Properties were bought for other businesses and people lose their association. A bomb is being made—a disequilibrium between people who live here and people who just visit.”<sup>36</sup> These businesses include bars, restaurants, stores, and so-called *hoteles boutiques* (boutique hotels), which have proliferated in Morelia’s historic center. Figure 5-14 provides examples of such conversions in Morelia. Some suggest the infusion of boutique hotels has enabled Morelia to tap into new tourist markets. Architect Eugenio Mercado López noted, “At this moment the highest-quality hotels in Morelia are little hotels that have developed in recent years. Previously the hotels were more medium and tourism was mostly Mexican nationals. The program for rescue was more responsible for the change.”<sup>37</sup>

Curiously, the much-lauded instant relocation of street vendors which transformed Morelia’s historic center and helped to boost total annual visitors by 92,495 (up 12.8%) between 2000 and 2007, and increased foreign visitors’ share of total arrivals from 4.0% to 6.3%, also contributed to historic center’s depopulation. As *ambulantes* moved into their new fixed quarters, nearby residential facilities were converted to shops to take advantage of increased activity.

### **Plan de Reestructuración Turístico de la Ciudad de Morelia**

Complementing the *Plan Parcial* was the *Plan de Reestructuración Turístico de la Ciudad de Morelia (PRT)* from October, 2001. The 226-page plan was developed by the Mexican subsidiary (IDT) of the Spanish Tourism consultancy DIT. The firm had been

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<sup>36</sup> Ricardo González Garrido (Director, Centro INAH Michoacán), in discussion with author, February 2009.

<sup>37</sup> Eugenio Mercado López (Architecture faculty, Universidad Michoacana de San Nicolás de Hidalgo), in discussion with author, August 2010.

widely recognized for its work in various Spanish cities prior to its engagement in Morelia. Its promotional materials identify their tourism strategy areas as follows: “We design innovative, market-oriented tourism products with high added value, routes and circuits, marketing plans and tourism management systems, as needed” (DIT Global).

The *PRT* included a comprehensive and direct diagnostic analysis of the Morelia’s then-existing situation regarding tourism, which was summarized in seventeen points. (Government of Morelia and IDT Consultants 2001, 42-45). The analysis concludes that Morelia possesses substantial architectural, historical, and cultural resources as well as worldwide recognition as a World Heritage Site. Morelia’s unattractive center, however, resulted in diminished valuation of such resources, which prevented it from taking full advantage of its potential. Visitors were characterized as a medium-low-cost market.

Unlike many tourism-planning documents associated with Guanajuato, *PRT* considered the local population and importance of sustainable tourism. Based on the diagnostic analysis, *PRT* proposed a series of operational objectives to complement an overall objective: “Turning the city of Morelia into a World Heritage tourism destination that is capable of responding to the necessities and interest of the local population as well as the tourists” (ibid., 48). Peppered throughout the broader plan are mentions of the need for economic sustainability and the importance of coordination and negotiation with public institutions, tourism entrepreneurs, and the public. Notably, the first specific plan detailed in the document is an awareness program for the resident population (ibid., 106).

Based on the diagnostic analysis, the *PRT* developed sixty-two specific action plans related to these general areas.<sup>38</sup>

- awareness and training for the resident population, public officials, students, and tourists;
- enhancing the value of Morelia's tourism;
- quality of lodging, restaurants, tourist shops, and complementary services such as taxis and handcrafts;
- marketing and post-sales service: communication, events, promotions, signage, tourist office, etc.; and
- improving coordination and management. A complex plan requires coordination among a range of actors and agencies

Each action plan included its objective, a description, a list of affected agents, and its priority. A sample, concerning lighting the exterior of landmarks in the historic center, appears on Figure 5-15.

The second element above, enhancing the value of tourism in Morelia, was the largest component of *PRT*. Its objective was to complement the efforts of *Plan Maestro del Rescate* and *Plan Parcial* to ameliorate the deteriorated appearance and condition of Morelia's historic center with complementary programs addressed specifically to tourism. The plan included four sub-categories:

**Improving tourist resources.** Restoration of churches and museums and other improvements, such as rationalizing hours of service (ibid., 124).

**Improving access to destinations.** This component includes improving identified deficiencies in the appearance of gateways to the city, parking availability, access to the

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<sup>38</sup>My translation.

disabled, and creation of a welcome center in the former site of the central bus station (ibid., 133).

**Improving the urban image.** The plan sought to address “the poor state of preservation façades of houses and buildings found in most traditional streets of the city, the feeling of dirty streets, poor lighting in many of the busiest areas, lack of urban furniture, lack of maintenance in parks and green areas, etc.” The plan noted that improving the urban image would not only help to preserve historic structures, but it also would “positively affect the conservation of their cultural values and their very identify of the city, improving the quality of life for its inhabitants” (ibid., 142). Many of the efforts under this rubric have already been implemented, such as the renewal of the arcades surrounding the main plaza, restoration of facades, evening illumination of landmarks.

**Quality.** The diagnostic analysis noted that existing products were medium-to-low in quality. This component included plans for improving hotels, restaurants, tourist shops, and complementary businesses, such as taxis and crafts. The plan takes note of the city’s existing Club de Calidad Tesoros de Michoacán program, which promoted the upper stratum of Morelia’s hotel market, and prescribes training and standardization for the middle and lowest level facilities.

As discussed earlier, Guanajuato’s tourism strategy focuses on promotion, on slogans—details covered by a small component of the *PRT*. The fourth element noted above, marketing and post-sales service, articulates seventeen specific actions related to promotion and enhancing the tourist experience, some of which have also been articulated in Guanajuato’s most recent plans. *PRT*’s promotion plans included creating handbooks for creating a unified visual image and tourist signage for Morelia, filling the

calendar activities for holidays, developing a tourist card, and developing a World Heritage tourist route.

It is beyond the scope of this work to examine all the details related to *PRT*. The salient point here is that DIT's plan for Morelia, much of which was successfully implemented, contrasts sharply with Guanajuato's efforts.<sup>39</sup> Clearly some aspects have fallen short. As Figures 5-16 and 5-17 illustrate, efforts to implement uniform signage in the historic center were thwarted by use of substandard plastic signs that rapidly deteriorated. The gateways to the city remain unsightly (as are Guanajuato's). Morelia is not without its problems, but in less than ten years it has radically remade its historic center into an attractive tourist destination, largely as a result of careful planning and plan execution. Referring again to Figure 5-2, the changes to Morelia have positively affected international visitor arrivals to that city, arguably more so than has inscription on the World Heritage list.

The *PRT* stands in marked contrast to the superficial tourism documents from Guanajuato. The distinction highlights the advantages of relying on outside experts. DIT was able to perform a dispassionate appraisal of Morelia's situation and prescribe creative, comprehensive, and actionable solutions. Apparently the success of this model has made an impression. The state of Guanajuato hired DIT to develop a promotional

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<sup>39</sup> The broader successes of Michoacán were highlighted by an OECD report, *The Impact of Culture on Tourism*. A chapter on Michoacán describes the state's "new and functional model for cultural tourism, which intends to give touristic value to the rich historical and architectural heritage, together with the natural environment, where towns, rural villages, and indigenous communities develop." It further notes: "This tourism prototype is avant-garde in the country and is based on sustainability, because it fosters economic, social, and cultural development for the citizens of these towns, while generating the commitment of all actors to preserve the environment and all cultural processes" (Organization for Economic Co-Operation and Development 2009,130).

website stressing events during the 2010 bicentennial of Mexico's independence movement.<sup>40</sup>

The tasks of preservation and maintenance of the heritage city are more viable when all the agents and actors involved in them—academics, residents, authorities, social groups, NGOs and business—can contribute to their sustainable management.

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<sup>40</sup> See website, <http://www.gtoexperience.com/>.

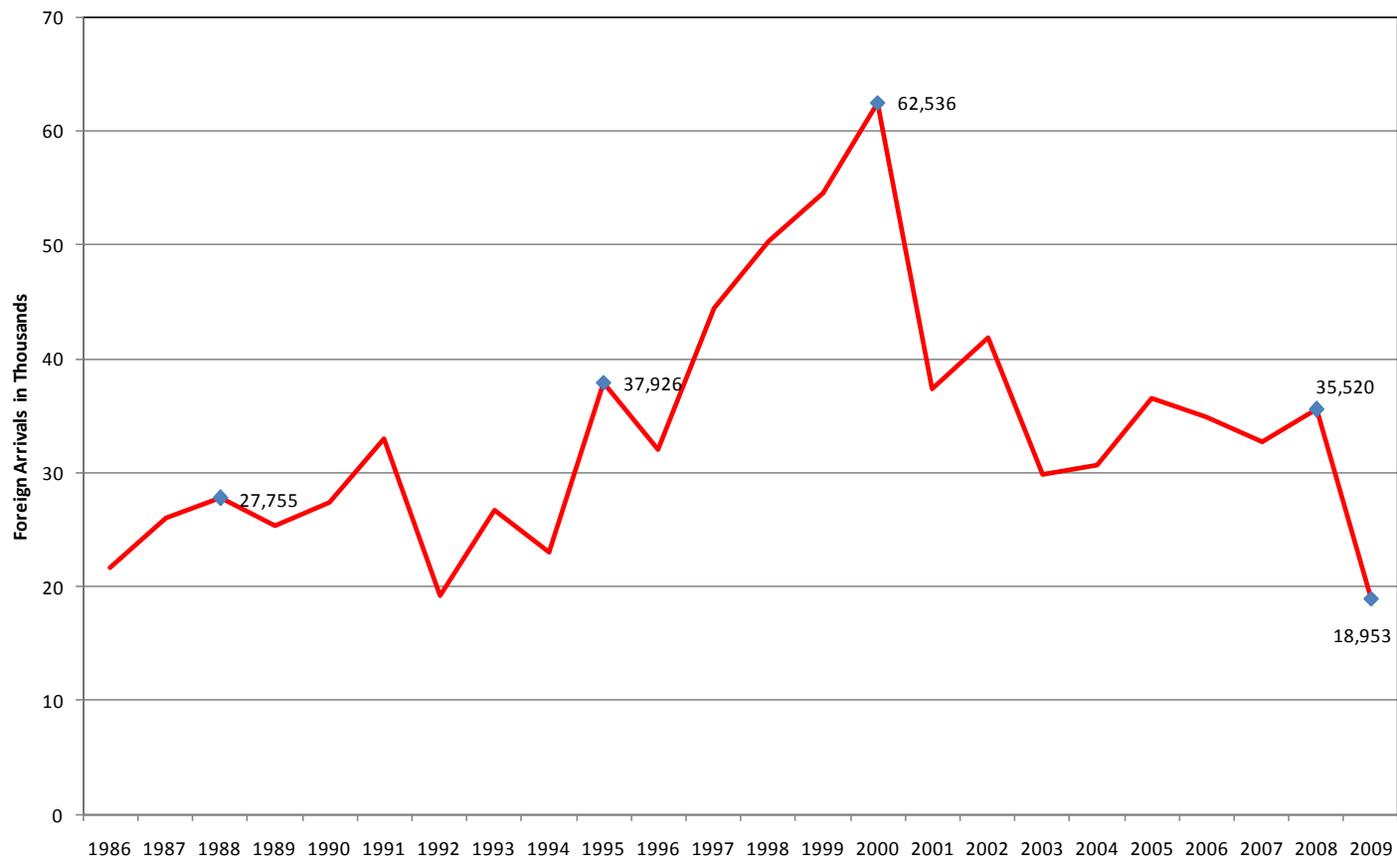


Figure 5-1. International arrivals to Guanajuato between 1986 and 2009. (Source: SECTUR, for dates noted.)

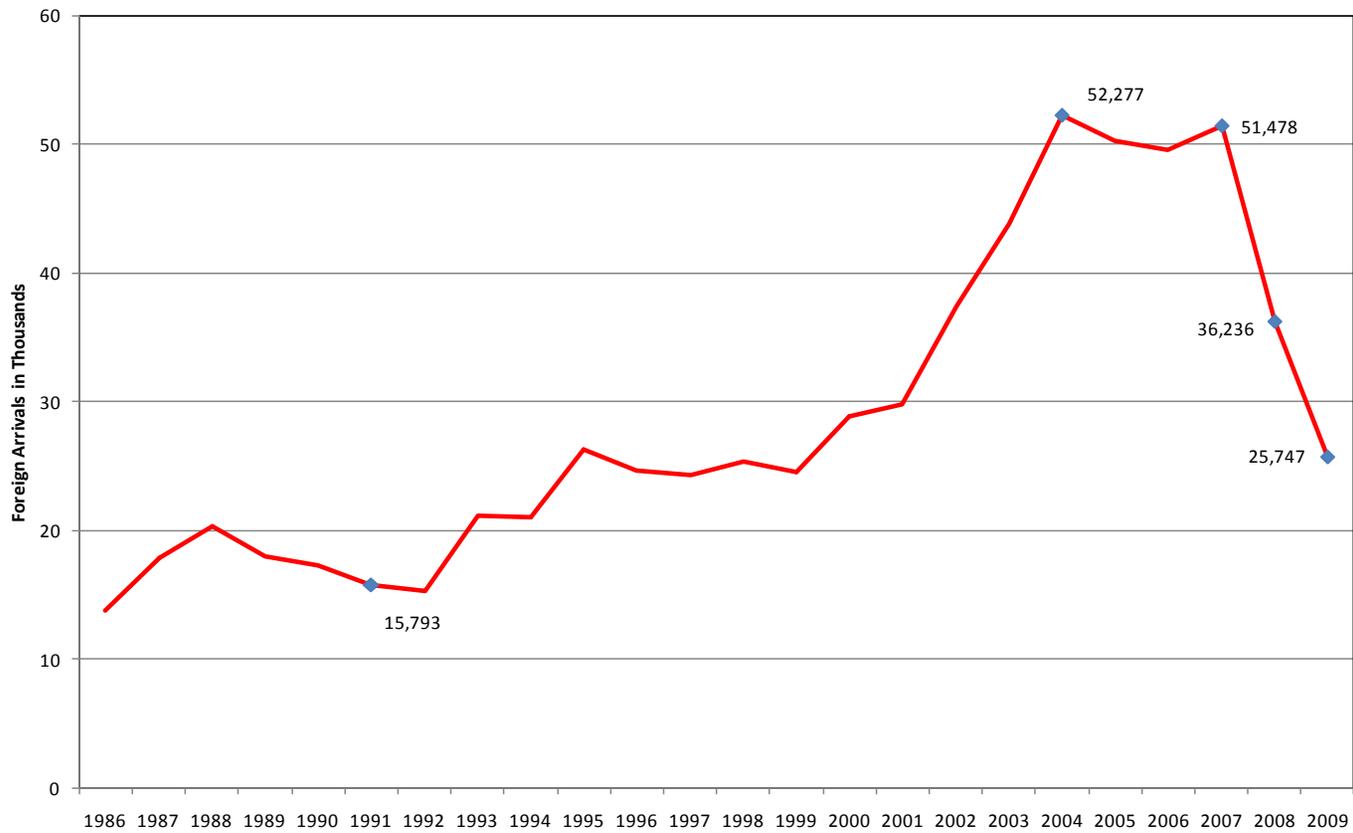


Figure 5-2. International arrivals to Morelia between 1986 and 2009. (Source: SECTUR, for dates noted.)

¡Buenos días! MARTES, 16 DE SEPTIEMBRE DE 2008 Año LXI, No. 20,002

# LA VOZ DE MICHOACÁN

LA VOZ DEL PUEBLO HECHA PERIÓDICO

**Reacción Calderón**  
 El presidente convocó a una reunión de emergencia al gabinete de Seguridad, y en un comunicado condenó los ataques; "los culpables serán castigados", afirmó



## ¡Terrorismo! Atacan con saña a Morelia

VERIDIANA LÓPEZ/ELLY CASTILLO/GIOVANNI FUENTES/ASTRID HERRERA/EMMANUEL CERVANTES/ERIKA RODRÍGUEZ, La Voz de Michoacán

- UN SALDO DE TRES MUERTOS Y 70 HERIDOS FUE EL RESULTADO DE LA DETONACIÓN DE 2 GRANADAS DE FRAGMENTACIÓN LANZADAS EN EL CENTRO HISTÓRICO, EN 'EL GRITO'
- EN LOS PRIMEROS MINUTOS DE HOY LOS HOSPITALES ESTABAN AL TOPE Y SE REPORTABAN NUEVE PERSONAS EN TERAPIA INTENSIVA; ENTRE LAS VÍCTIMAS HAY 9 MENORES DE EDAD
- DIVERSOS SECTORES SOCIALES CALIFICAN DE 'COBARDE' EL HECHO; AUTORIDADES CANCELAN DESFILE POR PRECAUCIÓN A POSIBLE ATAQUE

■ MORELIA, PÁGS. 16 a 23A ■



EL PRIMER ATAQUE CON GRANADAS DE FRAGMENTACIÓN SE REGISTRÓ A LAS 23:00 HORAS. FUE EN LA ESQUINA DE MORELOS Y MADERO; AHÍ MURIÓ UNA MUJER, Y YA EN EL HOSPITAL UN NIÑO.

7 503002 579480 DIRECTOR FUNDADOR JOSÉ TOCAVÉN LAVÍN (†) PRESIDENTE Y DIRECTOR GENERAL LIC. MIGUEL MEDINA ROBLES www.vozdemichoacan.com.mx \$7.00 MAUTINO \$1.00

Figure 5-3. September 15, 2008, violence in Morelia. (Source: Lopez et al. 2008.)



Figure 5-4. Contrast between traditional pavement and new pavement in Guanajuato's historic center. (Photo by the author.)



Figure 5-5. Guadalupe Mine, outside of Guanajuato, Mexico, July 2007. (Photo by the author.)

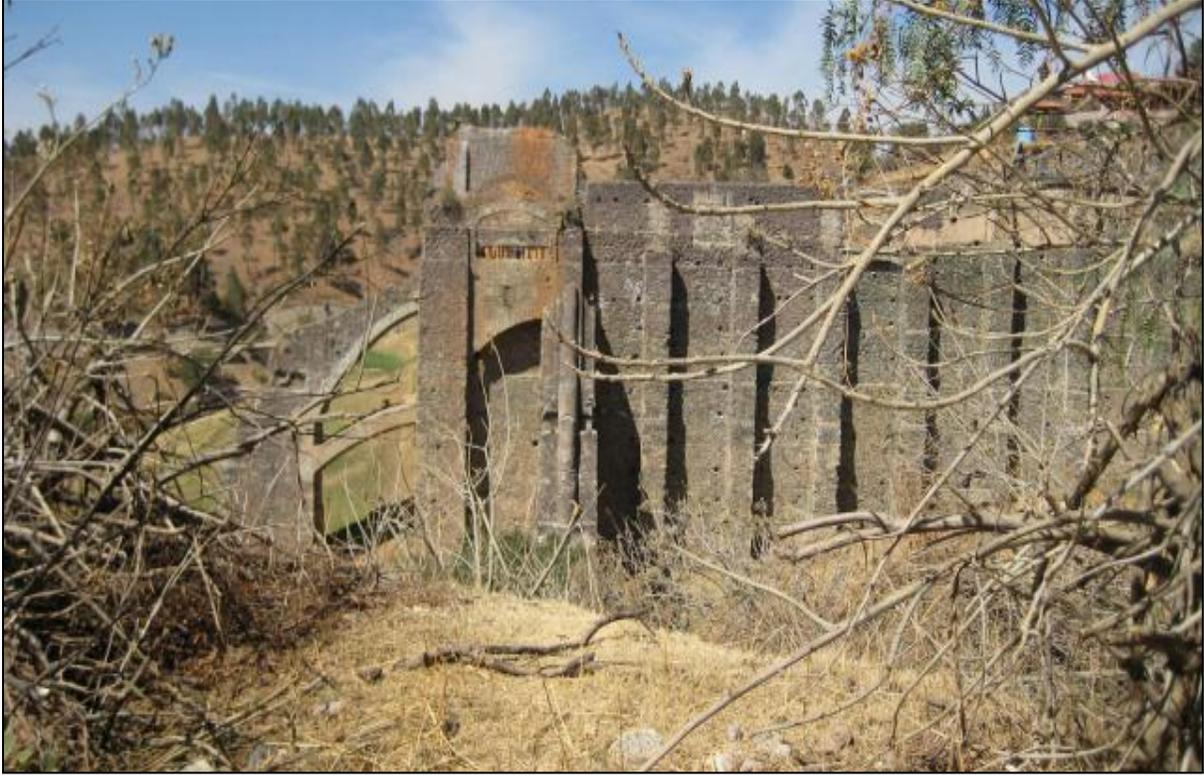


Figure 5-6. Guadalupe Mine, outside of Guanajuato, Mexico, February 2009. (Photo by the author.)



Figure 5-7. Proposed development in Mineral de La Luz. (Source: James Pyle.)

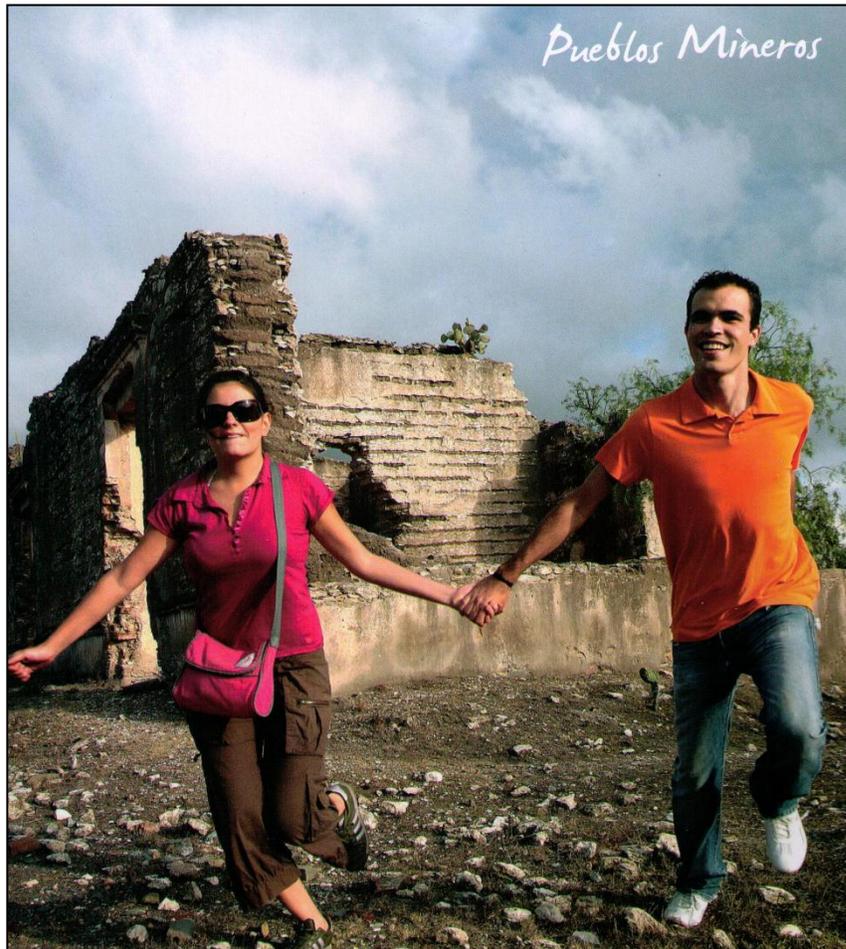
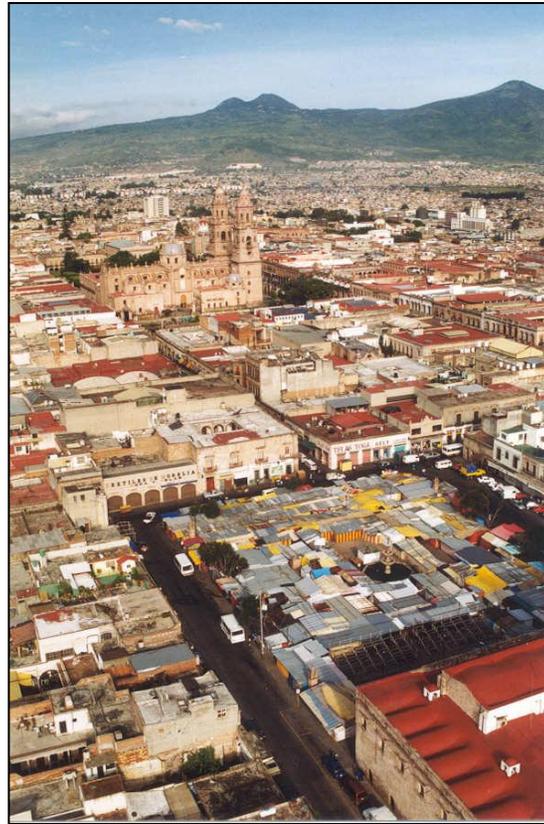


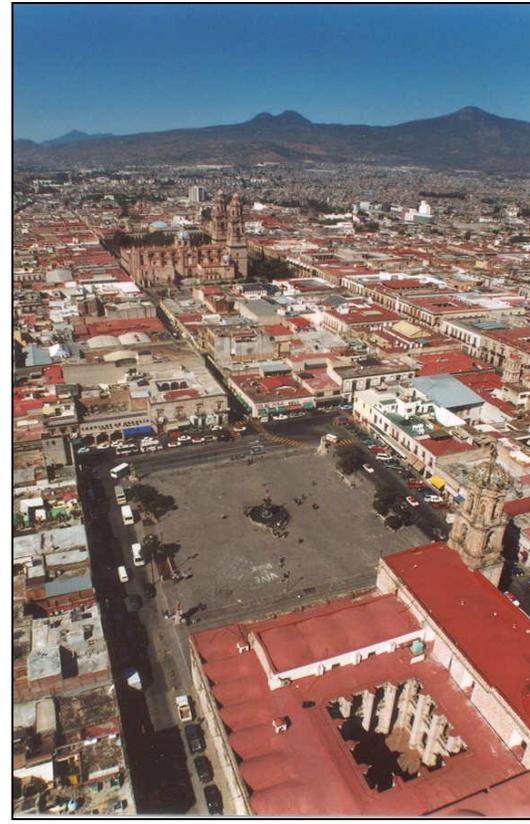
Figure 5-8. Cultural heritage as backdrop. (Source: "Libera Tus Emociones," State of Guanajuato, Sub-Secretaría de Desarrollo Turismo.)



Figure 5-9. The “Fox Effect” illustrated. Comparison of foreign visitor arrivals to Guanajuato and San Miguel de Allende, 1986-2009. (Source: SECTUR, for dates noted.)



A



B

Figure 5-10. Impact of removing informal commerce from Morelia's historic center, Plaza San Francisco. A) Before removal of street vendors. B) After removal of street vendors. (Source: Morelia Secretary of Tourism.)



A



B

Figure 5-11. Impact of removing informal commerce from Morelia's historic center, Plaza San Francisco. A) Before removal of street vendors. B) After removal of street vendors. (Source: Morelia Secretary of Tourism.)



Figure 5-12. *Colectivos* still clog central Morelia. (Photo by the author.)



Figure 5-13. Construction of controversial parking facility in Morelia's historic center is concealed. (Photo by the author.)



A



B

Figure 5-14. “Boutique hotel” conversions in Morelia’s historic center. A) Hotel and Suites Galeria. B) Hotel Pórtico. (Photo by the author.)

<b>25 Iluminación exterior en edificios monumentales del Centro Histórico</b>	
<b>Objeto de la actuación</b>	Contribuir a la puesta en valor turístico de los recursos patrimoniales
<b>Descripción</b>	<p>La monumentalidad de la ciudad de Morelia, la existencia de iluminaciones de fachadas exitosas –la catedral– y la necesidad de aprovechar el atractivo de la ciudad en la noche para ampliar la duración de la visita a la ciudad, hace que se proponga el acometer un programa de iluminación de edificios y monumentos en el centro de la ciudad.</p> <p>Para llevar a buen fin esta actuación se hace necesario elaborar un listado de aquellos recursos histórico-culturales que se consideren más emblemáticas y requieran de una iluminación externa que contribuya a su puesta en valor. Dicho listado deberá tener en cuenta las principales rutas turísticas de la ciudad.</p> <p>Los sistemas de iluminación que se propongan deberán ser discretos y eficaces.</p>
<b>Agentes implicados</b>	<ul style="list-style-type: none"> <li>• Ayuntamiento</li> <li>• SECTUR Estatal</li> <li>• Patronato Pro Rescate del Centro Histórico</li> <li>• CONACULTA-INAH</li> </ul>
<b>Prioridad</b>	Inmediata-Lanzamiento
<b>Presupuesto</b>	Medio
<b>Zona de aplicación</b>	Área turística histórico cultural

Figure 5-15. Sample page from *Plan de Reestructuración Turística de la Ciudad de Morelia*. (Source: City of Morelia Department of Tourism.)



Figure 5-16. Adequate signage remains a problem in Morelia's historic center. (Photo by the author.)



A



B

Figure 5-17. Some mistakes were made in Morelia's historic center. A) New signage in the historic center. B) Missing information, revealing cheap plastic base, contrasts with traditional enamel sign. (Photo by the author.)

## CHAPTER 6 CONCLUSIONS

### **Overview**

In the Review of Literature, a quote from Myra Schackley was highlighted: “It is frequently assumed that any site awarded World Heritage status will immediately receive a marked increase in visitors. However, this is not necessarily the case and visitor numbers depend on a number of factors including the way in which the site is marketed and issues connected with access” (Shackley 2006, 83). This study affirms Dr. Shackley’s assertion. The Mexican experience suggests it is often the case that World Heritage inscription leads to significant increases in international visitors, but over an extended period. Sustained visitor levels, however, depend on numerous influences, some of which are controllable on the local level, and some of which are not.

This investigation points to statistically significant increases in tourism attributable to inscription while controlling for the number of hotel rooms and global trends in international travel. For six out of seven cities examined, there was a statistically significant change in international arrivals as a direct and independent result of a city being inscribed on UNESCO’s World Heritage list. In the Mexican examples, this increase required one to eight years to materialize.

The impact of inscription upon World Heritage cities, however, is not simply a mechanical process whereby cities go on the list and tourism automatically increases. Interviews and simple observation, however, reveal other trends which suggest initial increases in visitors may sometimes be a temporary phenomenon, depending on public policy, local management practices, and other causes that may be less controllable.

Right after inscription, World Heritage Cities may improve their appearance, infrastructure, and tourism facilities, resulting in an eventual increase in foreign visitors.

The case studies demonstrated that beyond a narrow horizon, visitor trends are influenced by planning and management. That is not to say that planning and management, among other factors, have no influence on visitor levels during the first years after inscription. One would have to assume variable levels of sophistication in planning and management among all of Mexico's World Heritage cities ranging from tiny Tlacotalpan to gigantic Mexico City. Despite such variation, six out of seven such cities that were examined here demonstrated a significant effect of inscription on international visitors during the first eight years after joining UNESCO'S World Heritage list.

Visitor levels vary for many reasons. Guanajuato is a unique and attractive city that has had a long history of attracting visitors and has long had good highway access to Mexico City and Guadalajara, Mexico's two largest cities. As we have seen, despite membership on the World Heritage list, Morelia until the beginning of the twenty-first century was an unattractive destination, lacking a long history of tourism, and until recently, lacking good highway access.

Guanajuato may have enjoyed the benefits of the "Fox Effect" during the 1990s, while Morelia's post-inscription environment was influenced by political turmoil.

"Between 1989 and 1992 Morelia was a political laboratory," notes one observer.<sup>1</sup>

Mexico's left-wing Party of the Democratic Revolution was centered in Michoacán.

"There were a lot of political blockades and Madero Avenue was blocked for three or four months with demonstrations. They put campgrounds there. They had political

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<sup>1</sup> Hiriart Pardo, discussion.

demonstrations against the new (federal) government that was from the PRI.”<sup>2</sup> Viewing the quantitative results through the lens of this history enhances the value of this analysis and broadens its focus, inviting further inquiry into the longer-term impacts of municipal behavior, as well as World Heritage list inscription, on visitor levels.

The two case studies, however, demonstrate that many things are not the same when comparing one World Heritage city to another. As Figure 6-1 highlights, while both cities witnessed net increases in international visitors between 1986 and 2007, the change in Morelia was more than five times larger than that in Guanajuato—274.0% versus 50.8%. The result is that the relative position of the two cities with respect to international visitors was effectively flipped. In 1986, Guanajuato witnessed 57.4% more international arrivals than Morelia. By 2006, Morelia had 57.6% more international arrivals than Guanajuato.

Earlier, we pondered what could cause such a reversal. The answer that materialized from the two case studies is as follows. Guanajuato at times has suffered from poor planning and a lack of consistency in staffing and policies. Morelia developed thoughtful and detailed diagnoses and plans for conservation and tourism, and largely adhered to them. Morelia’s plans were forged with a level of community involvement that was largely absent in Guanajuato, where, for example, plans continue to encourage redevelopment of nearby mining communities in ways that threaten their centuries-old heritage.

Guanajuato’s policy of planning and development with less participation by affected actors is consistent with a political atmosphere which at times suffers from a

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<sup>2</sup> Hiriart Pardo, discussion.

lack transparency. Information about Guanajuato, data, and relevant reports were difficult to obtain. Little information is available to the public through the Internet. An example of this was provided in an interview concerning the participation of various Mexican World Heritage cities in an upcoming UNESCO study, “The researchers attempted to get Guanajuato to participate. That they did not—Querétaro and Morelia did—can be attributed to several reasons, which may work together, “commented one authority on Mexican World Heritage. “Guanajuato doesn’t have any data, and Guanajuato’s trend has been negative, due to an embarrassing lack of consistent policy—something they may not want to disclose.”<sup>3</sup>

In contrast, Morelia and the state of Michoacán appear far more transparent. Planning documents are made available online. A researcher in Morelia and Michoacán typically leaves a meeting with public officials armed with reports, data, and lavishly illustrated books. This difference may in measure attribute to Morelia’s success, of which it deserves to be proud. It may also relate to Morelia’s more inclusive approach to planning. Ana Compean Reyes Spíndola, a hotelier and former Michoacán State’s former Secretary of Tourism offered this observation about the importance of cooperation in Morelia’s successful planning efforts, “This is something that has to be done on the three levels of government and the people from the private sector, otherwise it won’t work out. It has to be a plan like that was done—the *Plan de Reestructuración Turístico de la Ciudad de Morelia*. If it doesn’t come from the private

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<sup>3</sup> Mercado López, discussion.

sector it will be very difficult to achieve the goals of the plan. This was a plan that was done for fifteen years.”<sup>4</sup>

As Morelia benefited from careful and consistent planning that considered the various players in the community, Guanajuato suffered from the precarious nature of public positions in that city. In an atmosphere where public officials are recycled every three years, they should be less likely to share information, especially if it may reflect poorly on their performance.

Guanajuato’s policies provided another argument for a long-run focus, rather than dwelling on the initial impact of inscription. “The government changes every three years. You need to look at twenty years ago in the city,” advised an academic and urbanist in Guanajuato.<sup>5</sup> Twenty-three years of data and many hours of interviews tell the story that sustained visitor levels are harmed by inadequate and inconsistent planning. Such a conclusion would have been more elusive without looking at the big picture.

### **Study Limitations**

Both the quantitative and qualitative component of the mixed methods employed with this investigation need be viewed with appropriate perspective.

The observations and conclusions resulting from this research must properly be viewed within the context of numerous limitations, many of which were noted in the introduction. Clearly, the results are based on data and case studies reflecting the Mexican experience. The findings may not translate or apply to other countries, with

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<sup>4</sup> Ana Compean Reyes Spíndola (Director of Hotel Villa Montana, Morelia and former Michoacán state tourism official), in discussion with the author, August 2010.

<sup>5</sup> Sánchez Martínez, discussion.

different political or economic environments, or less sophistication regarding tourism and cultural heritage.

Likewise, as the majority of Mexican World Heritage cities found their way onto the World Heritage list in the late 1980s and 1990s, the findings may be colored by particular events during that narrow time frame. On a global level, the end of the Cold War, the so-called peace dividend, and the technology boom, among other influences, resulted in increased affluence and mobility. For the exploratory quantitative analysis, some of the variation may have been captured by including the variable for total annual tourist arrivals as reported by UNWTO. Nevertheless, the only one of the seven Mexican World Heritage cities considered here that was not able to demonstrate a statistically significant relationship between inscription on the World Heritage list and international arrivals was Campeche. Because that city joined the World Heritage list at the end on 1999, all available post-inscription data for that city emerge from 2000 and beyond—a period that was less auspicious for sustained growth in international tourism. It is impossible to generalize from this one example, but the circumstances and the outcome suggest the other six cities may have benefited from a generally more favorable environment for growth in international tourism.

The quantitative portion of the mixed-methods analysis was exploratory and iterative in nature, and consequently operated outside of the strict limits of statistical orthodoxy. From a practical standpoint, exploratory analysis is a legitimate tool for analysis of situations when one needs to probe for answers. It ceases to be legitimate when an analyst is “fishing” for a desired outcome. Such is not the case with this investigation.

The statistical analysis relied on data collected by SECTUR through direct contact with hotels. It has been argued that distortions may arise because of hoteliers' financial interest in underreporting visitors, which subsequently would result in fewer tax payments to remit to the state. Interviews and analysis largely refuted this allegation. The data were not flawless; irregularities were observed and noted in prior discussion. Still, none of the people interviewed for this research and shown these data argued they were invalid.

Echoing an earlier point, one cannot overlook the value of scrutinizing more than twenty-two years of data. By looking at long-term trends, patterns emerge which would be less apparent if an analyst were to examine only the more immediate effects of inscription. Five of the seven Mexican World Heritage cities examined in the statistical analysis were included on the World Heritage list between 1987 and 1991. These cities experienced general growth in foreign visitors during the relative prosperity of the 1990s. Querétaro was inscribed in 1996. The outlier in this group, Campeche, was inscribed on the World Heritage list in 1999. This coastal city experienced miniscule change in international visitors during the years after inscription (-0.3% between 2000 and 2008), and a statistically significant relationship between World Heritage list membership and international visitors could not be determined. While the independent variables, available rooms, the value of the peso, and global tourist arrivals, would control for those influences, the possibility that other influences during this period may have restricted growth in visitors to Campeche cannot be excluded.

In contrast, Querétaro's international visitor levels more than tripled during the three years after its inscription in 1996, reflecting the robust economic environment during the end of that decade.

While the independent variables, available rooms, the value of the peso, and global tourist arrivals, would control for those influences, the possibility that other influences during this period may have restricted growth in visitors to Campeche cannot be overlooked. Further, as we have seen in the case studies of Guanajuato and Morelia, local politics, planning, and management—issues that cannot be easily quantified and modeled—bear much responsibility for apparent deviations from broader trends.

In Guanajuato's case, the post-2000 change in its Cervantino Festival arguably contributed greatly to erosion of that city's base of international visitors.

### **Value of the Research**

As was emphasized in the Review of Literature, there was a widely accepted view that inscription on the World Heritage list results in increased tourism, although little empirical evidence. Based on available data and on the assumed model specification, this investigation was able to identify a significant link between inscription and international visitors for six of seven Mexican World Heritage cities under scrutiny. To a modest extent, this research has helped bridge the divide between speculation and data-driven results.

A second major benefit of this research springs from the generous amount of data and the long-term view that it allowed. Existing research and discussion has typically focused on the immediate impact of inscription on the World Heritage list. The broader perspective enabled a discussion of what comes next, of what enables a World Heritage

city to sustain visitor levels, which in turn provides more resources for conservation and improvements.

### **Future Research**

The present analysis provides a basis for future research. One cannot exclude the possibility that the investigation's findings were the result of a unique Mexican situation or, as noted previously, the inscription of most Mexican World Heritage cities during the late 1980s and early 1990s. Possible future steps would involve redeploying the modeling exercise with data from other countries and other periods. The World Heritage List first appeared in 1978, implying that some sites have been included for over thirty years. As the World Heritage movement enters middle age, the research focus must shift its focus the birth and neo-natal periods of sites to a broader understanding that would open the door to understanding the life cycle of World Heritage cities. Within the Mexican context, it will be useful to observe future trends in visitor levels to better understand whether the observed post-inscription increases were a direct result of membership on the World Heritage list or a fluke related to unusual conditions. Likewise, more data will make it possible to determine whether the diverse trends in post-2000 international visitor levels to Mexican World Heritage cities have become more or less permanent phenomena. The consultancy that helped shape Morelia's tourism strategy was recently engaged by the Government of the State of Guanajuato to develop a strategy for its bicentennial celebrations DIT Global and its Mexican subsidiary IDT now counts nearly one-third of Mexico's states as clients. If this trend continues and structured tourism planning becomes more widespread, what will be the impact on Mexican World Heritage cities in general and Guanajuato in particular?

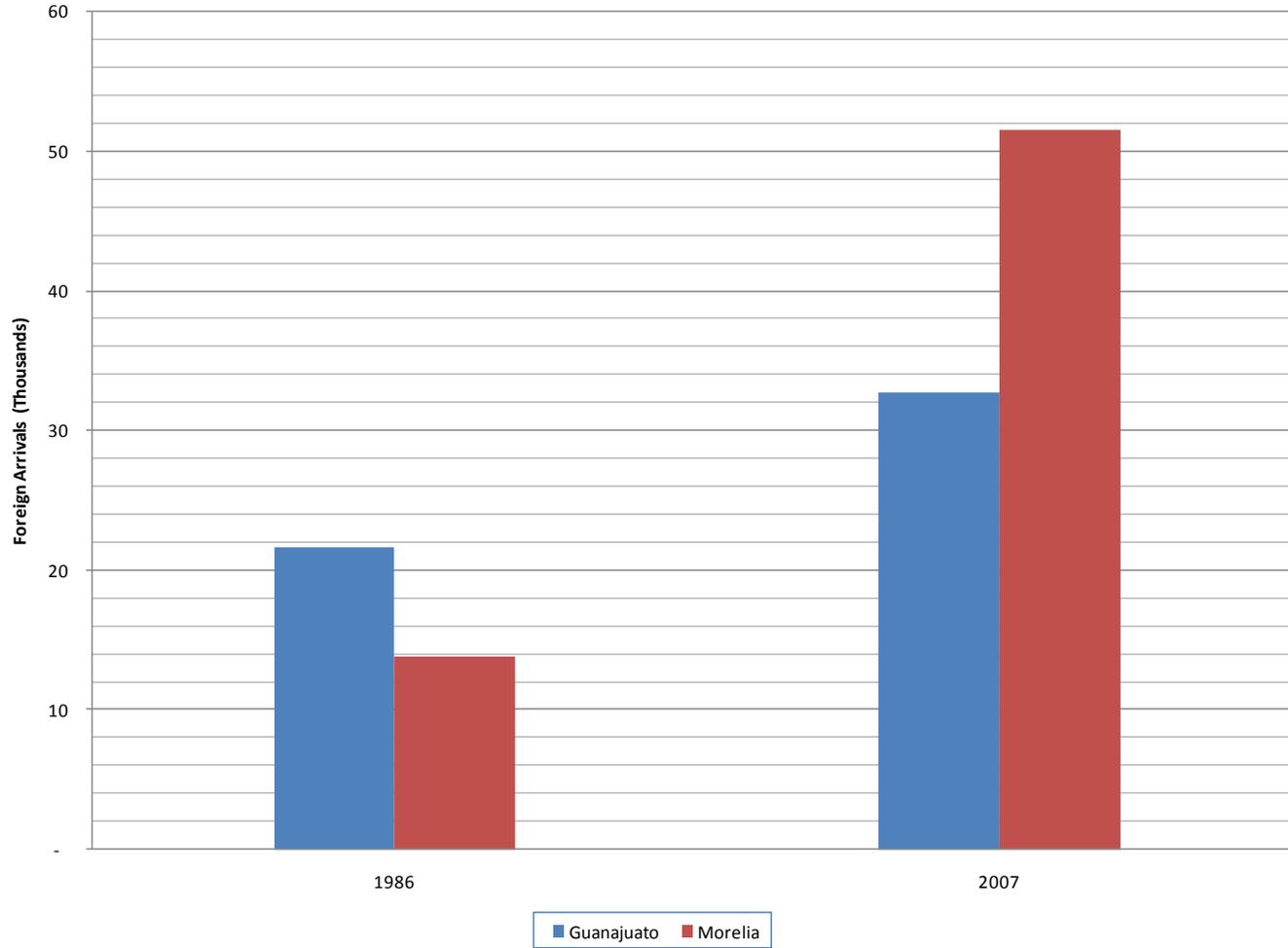


Figure 6-1. Comparison of international arrivals to Guanajuato and Morelia: 1986 versus 2007. (Source: SECTUR.)

APPENDIX A  
INTERNATIONAL ARRIVALS AT SEVEN MEXICAN WORLD HERITAGE CITIES:  
1986-2009.

	Campeche	Guanajuato	Morelia	Oaxaca	Puebla	Querétaro	Zacatecas
1986	11,251	21,662	13,765	74,716	16,174	10,417	4,543
1987	19,313	26,086	17,823	106,256	14,447	8,742	6,040
1988	26,006	27,755	20,262	124,213	19,454	10,340	7,813
1989	27,511	25,308	18,001	104,419	17,968	11,359	9,464
1990	26,721	27,342	17,312	110,494	24,047	11,144	12,051
1991	34,340	33,005	15,793	121,405	33,043	7,681	11,951
1992	42,074	19,223	15,259	127,621	38,530	9,316	9,787
1993	57,936	26,709	21,130	122,610	43,624	7,882	11,697
1994	46,885	22,994	21,025	80,371	26,834	9,726	10,768
1995	45,873	37,926	26,271	133,437	65,513	10,948	9,605
1996	57,256	32,008	24,636	175,593	89,450	10,362	12,759
1997	68,982	44,475	24,283	197,703	73,417	9,748	12,501
1998	71,838	50,366	25,357	232,027	122,500	35,191	13,011
1999	57,670	54,506	24,517	177,058	127,946	32,098	13,953
2000	70,079	62,536	28,843	157,704	167,847	28,712	27,418
2001	76,298	37,406	29,821	145,880	197,952	28,574	28,668
2002	77,406	41,866	37,364	125,553	208,969	29,143	26,384
2003	76,066	29,878	43,815	145,080	232,968	42,862	24,100
2004	62,413	30,697	52,277	160,430	240,674	70,972	31,034
2005	61,853	36,478	50,248	155,211	92,775	77,462	31,497
2006	66,711	34,858	49,613	106,700	101,356	80,524	30,111
2007	65,265	32,670	51,478	110,487	151,773	82,695	48,986
2008	69,793	35,520	36,236	126,713	134,506	64,723	45,340
2009	56,121	18,953	25,747	90,618	89,547	45,956	23,974

Source: SECTUR, for dates noted.

APPENDIX B  
MEXICAN PESOS PER SDR

1986	1.13
1987	3.13
1988	3.07
1989	3.47
1990	4.19
1991	4.39
1992	4.28
1993	4.27
1994	7.77
1995	11.36
1996	11.29
1997	10.91
1998	13.89
1999	13.06
2000	12.47
2001	11.49
2002	14.19
2003	16.70
2004	17.32
2005	15.40
2006	16.37
2007	17.17
2008	20.85
2009	20.48

Source: IMF, for dates noted.  
(<http://www.imf.org/external/np/fin/ert/GUI/Pages/ReportOptions.aspx>.)

APPENDIX C  
GLOBAL INTERNATIONAL ARRIVALS (MILLIONS)

1986	330
1987	360
1988	385
1989	410
1990	440
1991	443
1992	480
1993	499
1994	520
1995	541
1996	575
1997	599
1998	617
1999	640
2000	687
2001	687
2002	707
2003	695
2004	765
2005	804
2006	853
2007	904
2008	922
2009	880

Source: UNWTO, for dates noted.

([http://www.unwto.org/facts/eng/pdf/highlights/UNWTO\\_Highlights09\\_en\\_LR.pdf](http://www.unwto.org/facts/eng/pdf/highlights/UNWTO_Highlights09_en_LR.pdf),  
[http://unwto.org/facts/eng/pdf/indicators/ITA\\_Americas.pdf](http://unwto.org/facts/eng/pdf/indicators/ITA_Americas.pdf),  
[http://www.unwto.org/facts/eng/pdf/highlights/UNWTO\\_Highlights10\\_en\\_LR.pdf](http://www.unwto.org/facts/eng/pdf/highlights/UNWTO_Highlights10_en_LR.pdf).)

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## BIOGRAPHICAL SKETCH

Richard Shieldhouse has been interested in planning and preservation since his teenage years. He studied City and Regional Planning at Harvard University, focusing on transportation planning, and later worked in planning and financial positions in the airline and railway industry. Shieldhouse's interest in preservation was reignited in the early part of this century when he saw that one of Jacksonville, Florida's, modern landmarks, the Haydon Burns Library, was threatened with destruction. He became instrumental in a successful campaign that resulted in that building's preservation.

Shieldhouse entered the University of Florida's College of Design, Construction, and Planning, with an eye toward increasing his knowledge of preservation and architecture. The College exposed him to a wide range of related topics and ideas, which provoked an interest in UNESCO's World Heritage list. The topic at hand in this dissertation appealed to the author because it offered a marriage of his interest in preservation with his many years of experience in applied economics and analysis.

Although this research focuses on cities dating to the sixteenth century, Shieldhouse remains intensely interested in preserving Modern architecture. He was a founding member of the board of directors of DOCOMOMO US/Florida and is now the organization's President. He received his Ph.D. from the University of Florida in the summer of 2011.