



Tourism Cluster

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ABSTRACT

Competitiveness is not an attribute of countries; rather it is an attribute of the companies. A prosperous country is one that has a significant mass of globally competitive companies in one or more of its productive sectors.

The competitive advantage of different nations showed that the leaders in any field tend to cluster in relatively small geographic areas. These groupings are called cluster. Thus, within a country or region are created entire groups or cluster of related industries, highly efficient, that create a sustainable competitive advantage. These research and cluster analyses have the goal to illustrate the current situation of the tourism industry in the state of Puebla, pointing out the cluster environment.

For this analysis we used the method of documentary research and field research in books, pamphlets, programs and national and state agreements while interviewing and visiting people involved in the tourism cluster in both private and public industry. Research and analysis of tourism in the State of Puebla, is presented as follows: Overview of Mexico and the country's diamond, related to the cluster, general aspects of the state of Puebla, Puebla diamond, related to the cluster, Introduction industry and the cluster, global status of the industry cluster, value chain, industries, institutions for collaboration, map of the cluster and diamond cluster.

1. MEXICO OVERVIEW

Economic and Social Aspects

Located in the southern part of North America, the country has free trade agreements with the United States and Canada as well as other Latin American countries, and is one of the strongest economies in the region. Mexico is a mestizo, multicultural pre-Hispanic origin,

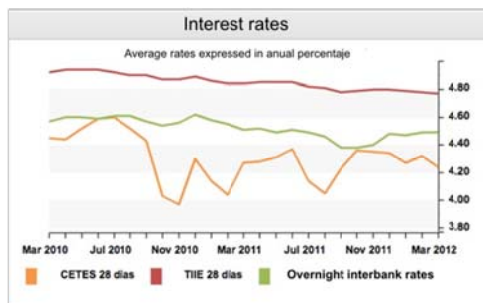
based on Aztec, Maya and Totonaco, with presence of Mixteco, Nahuatl, Mazateco, Totonaco, Otomí, and more. With an area of nearly 2 million square kilometers with coasts on the Gulf of Mexico and Pacific Ocean. It has 31 states and one Federal District, at the confluence of the powers of the Union.

The country's population is 112 million 335 thousand 538 inhabitants to the 2010 census. Of that total, 54 million 855 thousand 231 are men and 57 million 481 thousand 307, women. Of these, the DF is the most populous federal state, with 8 million 851 thousand 080 people and the state of Mexico, with 15 million 175 thousand 862 (Appendix 1).

While the Mexican economy has remained stable despite the crisis in the U.S. (derived from real estate and bankruptcy fraud) and Europe, what is recorded is economic stagnation. Exports are concentrated toward the U.S., where it reaches almost 90 percent of Mexican sales abroad. The Gross Domestic Product GDP reached 3,680% growth in 2011, after reaching a point above in 2010, variation was negative in 2009 (Appendix 2). Given the financial reforms and after the painful failures of 1994, the country has learned and certainly there is a financial system more fair, accurate and stable. Inflation is under control (3 to 4 percent per year) and interest rates remain at acceptable levels.

With current data to the fourth quarter of 2011, INEGI reports an economically active population of 50 million 273 thousand 465 people, of which 44 million 470 thousand 782 are women. The total unemployed population 2 million 437 thousand 409 people, and where they are suffering from unemployment is in the service sector (where tourism fits) with almost 30 million people (29 million 647 thousand 547 people). The economy in Mexico has had various controls and other times of economic instability. Currently, it has remained at levels acceptable enough given the global economic crisis that includes the U.S. and Europe, mainly.

There are two central social problems that bring down the country: migration and insecurity. In the absence of economic conditions and opportunities, historically important migratory flow has submitted to the U.S., with whom we split a border of more than 3 000 kilometers. "The presence of Mexicans in U.S. territory has its beginnings in 1848 with the signing of the Treaty of Guadalupe Hidalgo, by which Mexico ceded to the U.S. states of New Mexico, Alta California, Arizona and parts of Colorado, Nevada and Utah (100 thousand Mexicans became Americans), the study motivations of Mexican Migration, Nelly Salgado, researcher at the UNAM. An estimated 12 million Mexicans living in the U.S.



Comentario [EvESL1]: Estas gráficas con qué tiene relación???

On the other hand, or rather insecurity, organized crime is the scourge egregious that Mexico: an estimated 150,000 people have died as a result of war declared by President Felipe Calderon Hinojosa at the Mexican cartels groups dedicated the movement of drugs into the U.S. Forced disappearances, kidnapping, homicide, femicide, extortion and entry of minors into the ranks of drug trafficking six years have marked the dying.

Policy Issue

The political system is democratic and persists Division Executive, Legislative and Judicial. After two presidential administrations led by the National Action Party (PAN) opposition Institutional Revolutionary Party (PRI) that ruled for 70 consecutive years, the country is undergoing a federal electoral process which will be appointed President, Senators and Members of Congress Union, on 1 July.

The survey placed the average candidate tricolor, Enrique Peña Nieto, at least 15 points above the first female candidate of the PAN, Josefina Vazquez Mota. The presidential system is exhausted, and since in 2000 governs the PAN has a balance of powers between the legislative and the executive. The judiciary has become more relevant and have grown freedoms such as freedom of belief, secularism in education and marriage between same sex, at least in Mexico City.

The governors of the states became important counterweights President of the Republic, and today play a major role in the election. Currently competing for the presidency parties: PRI, PAN, and PRD-PT Honeycomb-Citizens Movement. In the states survive local or regional parties, but the big national parties are the Left (represented by the PRD, PT, right (PAN) and center parties (PRI and the Green Party).

Legal aspect

Legal frameworks in terms of competitiveness are partially stagnant. Mainly not been able to pass labor law reforms, the fiscal framework of Pemex (oil) and the Public Security Act. The Treasury Police frameworks put in check the state-owned Pemex revenue to be surrendered to the treasury, to the detriment of growth and exploitation of deposits, with the consequence of dependence on U.S. gasoline processed.

The country's tax base has grown, so that President Felipe Calderon believes the only way to expand fiscal resources is direct consumption tax, which, however, affect those who work and pay taxes, and benefit those who evade. Evertheless, since 2000 approved 50 amendments that included 11 new laws. Among the reforms is a pending administrative deregulation, higher transparency, and a framework to ensure greater fiscal responsibility.

According to Capote, "Structural reforms will lead to increased levels of competitiveness of the country and therefore a real chance of sustained economic growth, reducing poverty and misery, and the expansion of opportunities for all Mexicans" (2000)

Competitiveness

To speak of productivity is necessary to measure the Mexican labor, manufacturing and wages. According to the IMCO (Mexican Institute for Competitiveness) Mexico is the United States under this indicator and even below average (51.87 points). Mexico reached an index of 39.93 which places it in the place 32 of 48 in the less competitive is Nicaragua, with 29.58, and the more competitive is Switzerland, with 68.43 points. Competitiveness is measured by reviewing the rule of law and security, Environment, Human Capital, Macroeconomics, Politics and production factors and infrastructure, Governments, international relations and economic sectors.

The role of government

In the case of Mexico, the index of corruption and good governance is 3.60, according to the latest report from IMCO, 2008, when the best is 9.30 and the average of 5.59. That is, we're not even in the global average. The easy thing to attack the other political parties is a sport in Mexico. However, the three most important parties in Mexico have been government.

The PRI ruled the country 70 years. The PAN has ruled 12 years continuously, and the PRD has governed the capital since 1997 when Cuauhtemoc Cardenas won the election in Mexico City. Since then, the party has not lost an election there and the current candidate Manuel Mancera, is ahead by two to one of his closest rival. Returning to the point: the role of government should be a facilitator, orchestrator of the changes necessary for a country to develop its clusters. Mexico is no exception, and its role, as we said, is far from being seen as a reality.

Structural legal changes we have discussed and administrative deregulation are essential to promote stable economic development but consistent.

2. DIAMOND IN THE COUNTRY, RELATED TO THE CLUSTER

Factor Conditions:

- + A Country With Economic Stability
- + Well trained human resources.
- + Expertise in specific areas such as gastronomy.
- + Satisfactory Highways
- + Multiple Natural Attractions
- + Safe and Clean Beaches
- + Infrastructure Services Hotel and appropriate
- High Cost of Financing

- Trade balance deficit and Concentration of EU exports a
- Perception of Insecurity

Demand Conditions

- + According to preliminary estimates, in the first two months of 2012 14.8% of the country's tourism activity was related to the Tourism Meeting (preliminary figure subject to change). Source: Tourism Barometer Bulletin of progress meetings. Institution of higher education in tourism and Amdem (Destination Marketing Association of Mexico).
- + The demand fell in 2010 from the flu but recovered in the 11 '.
- + Is high demand from neighboring countries with whom we share cultural ties.
- + Cultural tourism is more European and more Americans looking for beaches.
- We are concentrated, undiversified.

Related and supporting industries.

- + There is sufficiency in airlines
- + The hotel rooms are adequate and with international quality standards
- + In large cities like Mexico City and Guadalajara, the artistic attractions are wide
- There is high influence of service providers such as land transfer
- Concentration of suppliers

Strategy, Structure and Rivalry

- + It is high in both is a big deal.
- + Is high because they compete intensely among entities.
- + There are many international chains
- There is no structure for suppliers in partnership by Industry
- The promotion is limited by small budgets

Government

- + It has broad participation in decision making
- + Generate incentives for private investment
- Could not reorder conflicts of airlines and flight attendants

Chance

The natural wealth

The closeness with the United States

3. PUEBLA OVERVIEW

Puebla is one of the 31 federative entities of Mexico and a Federal District. It is located in the eastern center territory of Mexico. It borders on the east with Veracruz; to the West with the States of Hidalgo, Mexico, Tlaxcala and Morelos and to the South with the States of Oaxaca and Guerrero. Puebla hasn't to access to the ocean and it presents desert, forest and valleys zones. Its surface is of 34.251 km², in which more than 5 million people live, making this state the 5th most populated in the country. The capital of the state is Puebla of Zaragoza, the 4th most important Mexican city by number of its inhabitants.

Comentario [EvESL2]: Esta parte, por lo menos, debe tener párrafo introductorio del Diamante.

DEBEN hacer la parte gráfica del Diamante de México

Comentario [EvESL3]: Por qué no incluyen un mapa de Puebla

Surface

Puebla has an area of 34 306 square kilometers (km²), for it is ranked 21 nationally. It occupies 1.7% of the country.



SOURCE: INEGI. Sociodemographic. Panorama of Mexico, 2011.

Territorial Percentage



The state of Puebla represents 1.7% of its land area.

The graph shows the comparison of land area between Puebla, Mexico City (the smallest federal state) and Chihuahua (the largest).

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Climate

35% of the surface of the humid temperate climate has been present in the Midwest and Southeast. 25% has warm humid climate in the north and southeast. 19% dry and semidry climate presents to the south and Midwest. 14% have hot and humid climate located in the north and southeast. The 7% with humid temperate climate in the northern region and a small area to the southeast. We also found a small percentage (0.2) of cold weather at the summit of the volcanoes.

The state average temperature is 17.5 ° C. The average maximum temperature is 28.5 ° C and occurs in the months of April and May. The average minimum temperature is 6.5 ° C during January. The statewide average rainfall is 1,270 mm of precipitation occurring in summer from June to October.

Agricultural areas in the state are found mainly in humid temperate regions. Corn is still the main crop, also produces peanuts, potatoes, garlic and beans, among others. The fruits are: apples, perón, avocado, coffee and orange.

Puebla has been of great importance in the history of Mexico. Within it were found the oldest remains of maize and potatoes in the region of Tehuacán. It was the scene of pre-Hispanic cities as important as Cantona and Cholula. During the colonial era, the city of Puebla became the second largest city in New Spain, thanks to its strategic location between Mexico City and Veracruz (coast). In the late nineteenth century, the state was among the first to industrialize, with the introduction of power looms that favored the development of the textile industry. Despite this, more recently, Municipalities Mixteca region of the Sierra Norte and Sierra Negra have become net ejectors population, whose main destinations are Mexico City, and for two decades, the United States.

Table 1. General State Information

Comentario [EvESL4]: Revisar si las gusta el título de la tabla

Capital	Heroic Puebla de Zaragoza
Municipalities	217
Length	34 306 km2, 1.7 % of the country.
Population	5,779,829, 5.1% of the country.
Distribution of population	72% urban (78% nationally) 28% rural (22% nationally)
Education	8.0 (Second year of secondary education), 8.6 is the national average.
Speak an indigenous language of 5 years and over	11 out of 100 people. Nationally 6 in 100 people speak an indigenous language.
Industry that contributes most to the state GDP	Manufacturing:emphasizes the production of machinery and equipment
Contribution to National GDP	3.3%

Source: based on INEGI data

GEOGRAPHIC DATA

State Statistics

In 2010, in the state of Puebla live:

- 1. TOTAL POPULATION: 5 million 779 thousand 829 inhabitants. 7.4% over 2005.**
- 2. Annual Growth 2005 - 2010: 79 000 339. 396 000 696 in 5 years.**
- 3. ENTITY the 5th most populated. After the State of Mexico City, Veracruz and Jalisco.**
- 4. PUEBLA, 4er most populous municipality. After Iztapalapa, Ecatepec and Tijuana. It has a population of one million 539 thousand 819 inhabitants.**
- 5. Metropolitan Puebla - Tlaxcala: 4th most populous. After the Valley of Mexico, Guadalajara and Monterrey. Its population is 2.7 million**
- 6. Population by age and sex: 2 million 769 thousand 855 men. 92 men per 100 women. 3 million 9 000 974 of WOMEN. They represent 52.1% of the total population**
- 7. Population by age:**
 - CHILDREN: One million 817 thousand 333. -0.6% (11 000 526) less than in 2005.**
 - YOUTHS: One million 572 thousand 557. 7.2% (106 000 48) more than in 2005.**
 - ADULTS: 2 million 139 thousand 636. 14% (262 000 479) over 2005.**
 - SENIORS (70 AND OVER): 250 000 304. 18.8% (39 billion 695) more than in 2005.**

Source: based on INEGI data

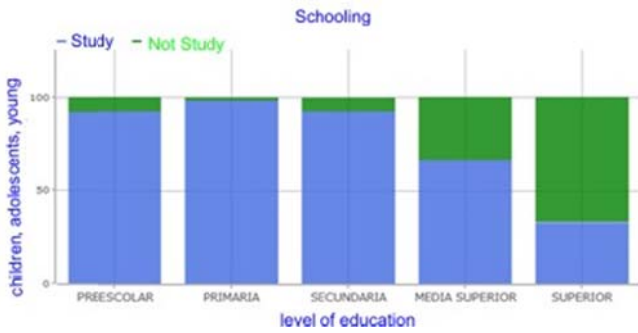
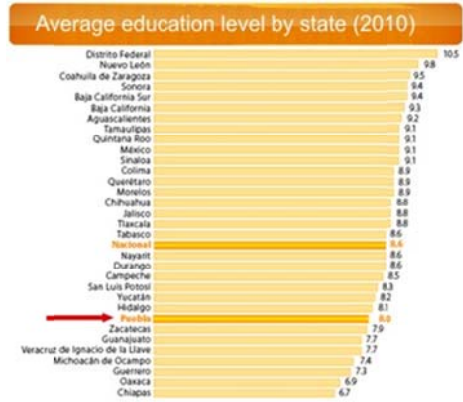
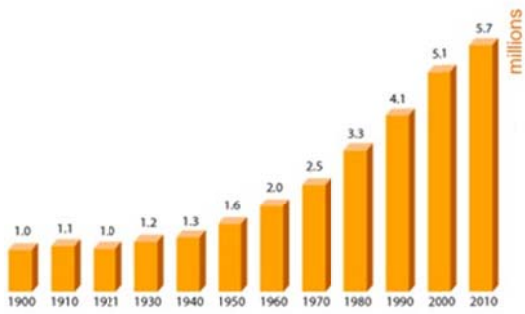
Education

Puebla is the most important region in education, with almost more than one hundred universities. Percentage of illiterate population: 10.4%. National 6.9. Ranking 5. Education average: 8.0 grade levels. National 8.6. Ranking 25.

Comentario [EveSL5]: Es lo único que van a poner de educación???

Graphics

Comentario [EvESL6]: Las ponen aquí o en los anexos?



Households

Computer	21 out of 100 households	National 29% Location 24
Land Line	3. 37 of every 100 households	National 43% Location 21

Internet	15 out of 100 homes	National 21% Location 23
Cellphone	49 of every 100 homes	Ranking 65% National 29
Cars	31 of every 100 homes	National 44% Location 27.
TV	89 out of every 100 homes	Location 93% National 26
Refrigerator	64 of every 100	Location 82% National 30
Washer	48 of every 100 homes	National 66%. Ranking 29.

CULTURAL ASPECTS

Cultural Heritage of the State of Puebla

The state of Puebla has legislation to protect the cultural heritage of the poblano. According to the Cultural Promotion Act of the State of Puebla, are considered cultural heritage objects of historical and knowledge to continue the historical tradition, social, political, urban, architectural, technological, ideological and economic character of the society that has occurred. Such creations may obtain recognition as a State Cultural Heritage by declaration of the state executive in consultation with the Council of Culture Poblano.

Among the works that have been declared Cultural Heritage of the State of Puebla is the Atlixcáyotl Huey, who earned this recognition in 1996. Other declarations of Cultural Heritage such as "The Fair Huipil and Coffee" held in Cuetzalan on October 4, the "Carnival of Huejotzingo" Tradition "Massacre" of goats in Tehuacan; The Mitotikuikacalli in Zacapoaxtla, "Monumental Huaquechula Offerings", the "Offerings of San Gabriel Chilac" the shrine "The Xochipila" in Xicotepec Juarez and the "Role of Huixcolotla Picado."

We also find the world's smallest volcano, the "Cuexcomate" , from the Nahuatl word "cuexcomatl" [k] which means "clay pot or place to store", with an elevation of 13 meters in diameter at ground level, outside diameter 8 meters and a base of 23 meters.

Gastronomy

Comentario [EvESL7]: Agregar la foto de un platillo o dulce típico. Como en la portada del documento.

The cuisine of Puebla, which became the product of miscegenation with the Conquest of Mexico by the Spanish, is one of the most representative of the Mexican Republic. Many myths are associated with some of the most popular dishes of regional cuisine of the state, which is usually identified in Mexico in relation to three dishes that are considered national dishes, mole poblano, chiles in walnut sauce and hip mole.

Beyond these three dishes widely known in Mexico and worldwide, Puebla cuisine is varied and shared with other Mexican cuisines cross breeding of indigenous elements, Spanish and Asian, product of the national history. In the city of Puebla it is possible to find lots of dishes, from appetizers such as boats, cemitas, tortas, tamales of different styles to haute cuisine, sweets and drinks as peculiar as the raisin (which is a drink made with liquor of raisins that is accompanied with a piece of cheese and skewered on a stick, exclusive to Angelópolis).

Throughout Puebla, the base of the food is maize, beans and chile. These three elements combine to produce a lot of dishes, such as enfrijoladas, consumed in any city of Puebla. Besides the capital, Puebla cuisine is diversified in each of their regions, which incorporates characteristics depending on available resources and ingredients.

Sweets: In the state of Puebla, there is a wide variety of sweets that are remarkable for their color and variety of flavors, most created since colonial times. In the convents of Santa Monica and Santa Rosa were developed for the first time the full range of its characteristic sweet flavor and quality have become famous in Mexico and the world such as the Santa Clara pancakes, sweet potatoes or yams poblanos Santa Clara, lemons stuffed with coconut, jamoncillo, garapiñados peanuts, macaroni, candied fruit, muéganos pinion, burnt milk, etc.. The most famous and characteristic is the poblano sweet potato.

Popular Arts

The state of Puebla is known for its wide range of culture. The flagship is the Talavera technique in which you make not only vases and dishes, but tiles and other elements of architectural decoration. This type of pottery covers several buildings of the capital of Puebla and other people (especially in the center of the state).

San Salvador Huixcolotla in Tepeaca Valley is the birthplace of shredded paper that is used as decoration in various Mexican holidays such as Independence Day or the Day of the Dead. In the region of Pahuatlán (Pueblo Mágico) amate paper is manufactured using a technique pre-Columbian has changed very little over time.

Also in the Sierra Norte there is significant production of handmade textiles, embroidered especially for women and the famous quexquemilt that the Nahua and Otomi women in the region use. Moreover, in the southern state is the production of the Mixteca Puebla pottery. In the central and southeastern region of the state, marble and onyx carvings are made, among other stones that are available through the fields and Tecali Tepeaca Herrera. Basketry is common to almost all the state, but is especially important in the Mixteca and the Tehuacán region, where the palm used grows in the wild. Also worth mentioning is the art of excellence

Comentario [EvESL8]: Podrían meter alguna imagen de artesanías o arte popular?

of the people of Atlixco and Tenango of Flowers (and other smaller), is the cultivation and improvement of ornamental plants.

Popular Festivities

There are many popular festivals throughout the state. In Puebla there are various carnivals, such as Huejotzingo, El Alto (related to the Carnival of Tlaxcala) and St. Jerome Xayacatlán, each with unique characteristics. In addition to these holidays, each town has its own festivals dedicated to employers. Just in the case of the city of Puebla are 83 religious festivities known in various neighborhoods of the historic center, tell them that Ernesto Licona, are experienced intensely by people who participate in them.

Among the civic festivities taking place in the state is certainly Mexico's national holiday: Independence Day (September 15-16), commemorating the anniversary of the war that ended the Spanish domination in the country. On May 5th is another important civic holiday, since the identity of Puebla is structured around the Battle of Puebla, the main historical event of significance in the official history of Mexico for the time the Eastern Army and the Mexican militia defeated the French invaders in 1862.

Archaeological heritage

In the territory now occupied by the state's territory various peoples inhabited since pre-Columbian times. The testimonies of their presence are part of the cultural heritage of Puebla, and are protected by both local authorities and by the National Institute of Anthropology and History (INAH). In Puebla, there are several archaeological sites but only some are open to public visits

Architecture

The state of Puebla has a rich architectural heritage, ranging from the Great Pyramid of Cholula to modern skyscrapers being built today in the state capital. Puebla de Zaragoza is precisely where one of the highest concentrations of colonial buildings in the state, which led to his call Shrine of America and the declaration of World Heritage Site for its historic center in 1987.

In this set of monuments are numerous religious and civil buildings constructed in baroque and neoclassical styles. Among the most notable is the Cathedral, the Capilla del Rosario found in the Temple of Santo Domingo, the old City Hall, the House of Dolls, the Temple of the Company, Carolino Building, the House of Alfeñique and many Catholic churches.

The time of the Christianization of the Indians produced numerous religious buildings in the towns of the province of Puebla.

Arts

Comentario [EvESL9]: Alguna imagen de la arquitectura?

Comentario [EvESL10]: Alguna imagen?

Puebla has a rich artistic activity. The artistic heritage of the poblanos includes a legacy with millennia of history, a product of the various peoples who have inhabited the territory of the state from pre-Columbian times. The state is known for the high quality of its colonial art, which has a museum specially designed for the exhibition of colonial art pieces. Poblano Museum of Colonial Art, established in the capital of Puebla, has a collection of artistic pieces that were part of various public and private collections.

In Puebla colonial buildings are high quality works that are integrated into the architecture of the place, as witnessed by the many religious buildings throughout the state. Contemporary poblano art has much less exposure than the arts of the past. Schools play an important role in the formation of new creators.

Tourism

The state of Puebla is one of the top tourist destinations in Mexico. The city of Puebla is located in the seventh national preferred tourist destination, however the period of stay is only 1.6 days. Other cities in the center of the state like Atlixco and Cholula de Rivadavia and Tehuacán, occupy secondary places as recipients of visitors. This draws attention to the case of Cuetzalan del Progreso, which was visited by a number of tourists that exceeds the number of its inhabitants. Most foreign tourists stay in establishments located in the capital of Puebla.

In 2006, first time one of the most outstanding tourist elements was inaugurated in the city. This is an event held every 5 years. Its name is Angelis Custodiant, a great event that brings together 125 bells in 32 bell towers of the historic center of Puebla, including the city hall bell. It was conceived to celebrate the 475th anniversary of the founding of the city. This concert was composed by the musician and poblano Bely David Roch.

"God sent his angels to protect you on your path". The bells have been instruments of communication, not only for spiritual acts, but also meetings and used to convene a meeting of residents. There is also a zoo called Africam where you can see the lives of several wild species in a habitat outdoors.

Comentario [EvESL11]: De dónde es la cita textual?

In 2011, Zacatlán of Manzanillas was declared a "Magical Town", thus promoting this type of tourism in the state, it is the second Zacatlán municipality in the state to join the peoples program SECTUR magic. Its heritage and its gastronomy make Zacatlán a Heritage and "Magical Town" of Mexico and the State of Puebla.

Other major attractions of the state are:

Museo Amparo Museo Bello y Gonzalez, former convent of Santa Rosa, Revolution Museum, National Museum of Mexican Railroads, La Concordia and Patio Tile, Forts of Loreto and Guadalupe Cathedral, Palafox Library, Main Theater, Market Craft "El Parian" Alfeñique

House, Museum and Art Gallery Jose Luis Bello and Zetina, Puebla Planetarium and Zoo African Safari Park and the capital of the state.

Stone Valley Encimadas in Zacatlan; Horsetail in Zacapoaxtla; The Franciscan Convent Tecamachalco; Karmidas caves in Zapotitlan of Mendez; Church of San Francisco and Regional Museum of Cuetzalan in Cuetzalan; Church of San Francisco and Colonial Museum in Huejotzingo; Convent of San Francisco, Plaza Principal, House of Culture Museum and archaeological site of Cholula San Pedro Cholula; Church of the Immaculate Conception, production and sale of Chignahuapan areas.

ECONOMIC, POLITICAL AND SOCIAL ASPECTS (Source: Analysis of Competitiveness 2010)

1. Puebla was put in 24th place of the State Competitiveness Index of 2010 without showing changes in its position on the 2008 index. With its current rating (39/100). It remains 10.5% below the national average score.

2. Puebla has a GDP per capita 36% lower than the national average. That is the Poblanos generate 39.938 pesos less per person than the average Mexican. This gap decreased from 2006 due to higher average annual growth rate of GDP per capita poblano (5%) compared with the average growth rate of the 32 (2.8%).

3. In 2008 the GDP growth rate of State maintains a level 1 percentage point higher than the national average falling at a rate of 3.1%

4. The investment per person (EAP) grew 25% from 2006 to 2008. Although growth was higher than the national average (16.6%). there is a negative gap of \$ 1.230 per PEA compared to other states. With \$ 3.769 / PEA Puebla has the eleventh lowest investment by SAP in the country.

5. Unemployment in the state for the fourth quarter of 2008 was 3.2% which surpasses the national average (4.1%).

6. In the past three years the variable holds values ranging from 2.7% to 3.7%.

7. For 2008 the informality in the economy reaches a value of 32.8% higher by almost seven percentage points to the national average.

8. Puebla did not show changes in their competitive position because the state improved in four factors lost five positions and was unchanged in one

Source: based on INEGI data

Highlights the progress of eight sites in "system reliable and objective law" and drop positions DE14 "dynamic and stable economy" and five places in "Use of international relations." Besides the outstanding, Puebla showed moderate changes in "Sustainable management of the environment" and "efficient market factors," advancing a position in both. Gave up two positions in "world-class precursor sectors", while losing a position in "stable and functional political system" and "vigorous economic sectors of competence." The factor "inclusive society, prepared and healthy" did not change its position. Although Puebla did not change competitive position from 2006 to 2008, its overall score improved 5%, surpassing the national growth of 2%. About himself, Puebla advanced in 62 indicators, fell in 36 and remained constant at 22.

1. The most important changes:

Positive

The most significant change in status was the factor of "efficient and effective government." This result is due to both an improvement in business environment improvement in public finances. On the one hand, the government increased 83.8% ease of starting a business and reduced the fee for processing fee (as a percentage of GDP) in 20.4%, thus presenting an improvement in rates of business opinion. Puebla scored 1.5% higher than in 2006 at the rate of management of business procedures, while the national average fell by 5.6%, thus leaving last place in the ranking of this indicator. On the other hand, improved the rate of business opinion on the regulatory framework by 2.8%. As for government spending, government investment almost doubled, while spending on payroll fell almost 4%.

The advance of eight positions in "reliable system of law and order" is primarily a result of improved security. For example, decreased the number of crimes per 100,000 population of 11.868 to 7.750 while the national average increased 16%.

This forward Puebla positioned between the 10 states with lower crime rate. It also decreased slightly (2.3%), the homicide rate, contrasting with 48% growth in the country. This was also reflected in the percentage of people who feel insecure, which decreased from 56% to 49%. However, Puebla still have changes in their judicial system and remains in the last positions in indices of institutional quality of justice, impartiality of judges and duration of commercial procedures.

Negative

The major downfall for Puebla was "dynamic and stable economy", which fell 14 places ranking at 20. This decline resulted mainly from an economic slowdown in 2006, it filed a Puebla average growth rate of GDP (2004-2006) of 6.5% while in 2008 the average growth rate (2006-2008) was 3.6%. Although its risk rating remained, lost points compared with the

improvement of other states. Finally, although the condition increased bank deposits (as a percentage of GDP) in 14%, was surpassed by others because on average, the country increased 17% coverage. In "Use of International Relations", sank from 24 to 29 due to a decrease of 46% in foreign direct investment and a decline of 21% in the indicator of dependence on imports from the United States.

Strengths and Weaknesses

Strengths

Puebla is above the national average in three of the ten factors of competitiveness. It is located 17% above the national average "economic sectors in vigorous competition," 7% "efficient and effective government" and 5% in "Sustainable management of environment." These subscripts Puebla leads to other states:

- Responsible for regulatory reform to facilitate business procedures
- Value added in manufacturing, maquiladora and export services.
- Efficient use of water and clean energy sources.

Weaknesses

Puebla is located below the national average in seven factors, of which four stand out for being among the last places. Puebla is the fourth state with the lowest scores on "Harnessing international relations" (61% below the national average) and the sixth lowest in "stable and functional political system" (41% below the national average), "Prepared and healthy inclusive society "(22% below the national average) and" efficient market factors "(21% lower than the national average).

These subscripts Puebla has significant disadvantages such as:

- A delay in relations with the outside by having low tourism incomes and a low level of imports from the United States, as well as long distance calls and correspondence sent and received.
- Failure to provide an alternate party before 2008 and in relative terms less electoral competition and a greater number of challenges to the election of 2005.
- High illiteracy rate, high percentage of population still lacks access to clean water, high income inequality and deaths from malnutrition.
- Low agricultural labor productivity and fixed assets and a lag in the number of tractors per 1,000 hectares

Strengths

Society

- The fourth state with less work because of sickness absence (5.2 days on average) and fourth with increased labor force participation of women (39%).

Government

- The second state with the greatest ease of starting a business and second to better business opinion on the regulatory framework.

Economic Sectors

- The state with the highest value added in manufacturing, maquiladora and export.

Weaknesses

Right

- The second state with less agility in business processes and impartiality of judges. It is the lowest in the index of institutional quality of justice.

Environment

- The third state with less-protected areas km².

Society

- The fourth state with the highest number of deaths from malnutrition.

International Relations

- Fourth Estate with lower tourism revenues.

Upcoming challenges

The economic slowdown in Puebla involves significant challenges in the competitive behavior of the entity. His commitment to the industrial and agricultural development is compromised by its lags in productivity of fixed assets and labor (place 26 in both indicators). The modernization of the country continues to lag behind and still has a high number of workers per hectare (61% above the national average).

In relation to tourism, the entity has disadvantages with the rest of the south-southeast, in terms of number of tourists and tourism revenues.

In society and the environment

Puebla's government must work in social development to compete in sectors with high added value. In this sense, must combat poverty, it is among the states with more deaths from malnutrition, income inequality and population without access to drinking water. You also need

to improve education, to have a low literacy rate, average education level, people with higher education and computer penetration.

To improve on environmental issues is required to increase the volume of treated wastewater and reduce over-exploitation of aquifers.

In government

Puebla showed significant improvements in business regulation and reduced cost of bureaucracy, however, the government should work on the quality of public finances to be one of 10 states with the lowest budget transparency, low fiscal autonomy (found 30% below average) and have increased 1.9 times the average balance of debt.

Finally, the state judiciary must work harder because it is one of the most backward in the country on the subject. Their efforts should focus on improving the quality of institutions, and that is in last place. It also has to work in the impartiality of judges and expedite the resolution of business processes.

Political situation

The governor Rafael Moreno Valle Rosas (from a four alliance parties) won the elections in 2010 for first time against Institutional Revolutionary Party.

The political situation is stable but the part’s system is old and the social organizations has few relevance.

The city of Puebla has ruled alternately by two parties: PAN and PRI, since 1993, which has been good for democracy but has led to the confrontation between the mayor and the governor in office.

The state Congress is under de facto control of the political forces that won the election in 2010 and a dozen deputies are campaigning for a seat in federal congress.

The current administration put in jail to a former secretary of state of the previous government and has applied legal responsibilities over former public servants.

4. DIAMOND OF PUEBLA, RELATED TO THE CLUSTER

<i>Factor</i>	<i>conditions:</i>
Puebla has a privileged location. A 120 kilometers from Mexico City, has a great communication with the Midwest and the Veracruz coast. This advantage allows it to be anchor of corporations that need land transport infrastructure. Businesses located in Puebla are about 2 hours from the port of Veracruz, close enough to be competitive in their shipping, but without the bad weather of the coast. This is a competitive advantage: the weather. Puebla has a temperate climate ranging from a range of 17 to 24 degrees Celsius.	

Something positive about the transport system and lack of coordination between industries.

Strategy	and	Rivalry:
Is high, having more than 15 thousand rooms, and opening numerous restaurants.		
Is high compared to other states.		
Is negative than a beach destination and poor coordination between levels of government and industry.		

Chance:

Very good weather	
economic Crisis	
Seismic zone and is home to the volcano Popocatepetl, whose activity is consistently high.	

Government:

Farm their energies to promote tourism in the short term on the 150th anniversary of the Battle of Puebla, where the national army repelled the attack of invading French forces in 1862. Has the name of two municipalities Magic Town: Pahuatlán and Zacatlán.

Comentario [EvESL12]: Colocar el esquema del Diamante de Puebla y explicarlo brevemente.

Comentario [EvESL13]: Alguna gráfica que puedan incluir?

5. WORLDWIDE TOURISM INDUSTRY SITUATION

For decades, tourism has undergone a continuous growth and a profound diversification, until turning into one of the fastest growing sectors in the world.

World tourism holds one of the closest relationships with development and within it are a growing number of new destinations. This dynamic has converted tourism into a key driver of socioeconomic progress. The general expansion of tourism in industrialized and developed countries has been beneficial in economic terms, for many related sectors, from construction to agriculture o telecommunications.

The contribution of tourism to world economic activity is estimated at around 5%. Its contribution to employment tends to be slightly higher than relative terms and is estimated at between 6% and 7% of the total number of jobs in the whole world (direct and indirect)

Between 1950 and 2010, the arrival of international tourists grew at an annual pace of 6.2% and went from 25 50 940 million. Income generated by these arrivals grew and an even faster pace reaching around 919 billion dollars in 2010.

In 1950, the 15 most popular destinations absorbed 88% of the international arrivals; in 1970 75% and in 2010 55%, as a reflection of the appearance of new destinations, many of these in developing countries. Growth has been especially fast in emerging regions, with the percentage of tourist arrivals and development rising continuously, from 32% in 1990 to 47% in 2010.

The recent years have been characterized by the occurrence of natural phenomena with enough potential to effect world tourism: economic hardship in the United States, serious

economic problems in some European countries (Greece and Italy), political conflicts of great scale in countries in northern Africa and the Middle East and the earthquake and tsunami catastrophe in Japan.

International tourism is sensitive to several factors that impact said economic activity: infectious diseases, weakening of infrastructure, communications, mobility, lodging, food quality: contamination, security: violence, services, amongst other.

The Situation of Mexico's Touristic Industry

Mexico is in 10th place according to the World Tourism Organization chart. In 2011 it received 22.4 million visitors. Tourism contributes to 9% of GDP. It generates 7.5 million jobs of which 2.5 million are direct and 5 million are indirect. It reunites more than 43 million economic units and 80% of those are small businesses. Mexico is the top destination for foreign tourists in Latin America.

Tourism is a priority within a national Strategy Plan. On February 2011, a national tourism agreement was signed in which Governors, Legislators, Academia, Unions and business, having a goal of being in the top 5 world destinations by 2018, which means 500 million visitors, 40 million dollars and 300 million internal trips.

On the fifth government release, Guevaro Manzo said: "tourism is an important part of our country's agenda and is a national priority.

As you know, this year marks the beginning of the strategic plan decreed in 2011 as the Year of Tourism in Mexico, in order to turn this activity into an engine of development." By the same manner, President Felipe Calderón became the first Head of State to sign the Golden Book, a distinction that was given to Mexico for injecting actions in favor of touristic activity. On the other hand, in the past edition of the Fitur of Spain, the Route/Trail of Don Vasco, in Michoacán, was awarded as the best touristic product.

Guevara Manzano informed that in terms of touristic promotion, there have also been advances. He explained that the Mexican Campaign "Mexico in your Senses" has won 91 international awards, amongst those the Magellan Awards and the Tour Film Brazil.

Generals' Aspects "Tourism"

Tourism, background:

The antecedents of the trips and touristic are found in the origins of the humanity, when on the Earth face collectors inhabited the hunting societies, that were nomadic towns that as unique reason to travel was to persecute and to pursue to the great mammals that were the base for their feeding and survival. These same societies over the years were discovering other motivations to travel and to move as it were to escape of the demographic pressure, tribes enemy and attracted by the stranger.

However in old history organized societies like Egypt, Greece and Rome, whose reasons to travel were, commercial, territorial, religious and educative. That is to say, they are civilizations that travel to extend their political and cultural power towards other places to become dominating populations of great geographic extensions.

Later at the medieval time, a big backward in displacements and trips, due to the fall of the Roman Empire what caused that the borders became insecure causing that people did not take the risk to travel. All this is going to be recovered over the years and the trips and the tourism would reach their maximum splendor in century XVI with the arrival of the Renaissance. A transcendental fact is going to be the discovery of America that is going to cause that numerous people travel to these new places to know new cultures where Kings and Priests are going to have great territorial extensions under their control in this new world discovered, motivating to retailers and merchants to travel towards there looking for new economic growth and new forms of life. Therefore those are two events that allow that the trips and the tourism become a life way. The discovery of America by Cristóbal Colon and the discoveries in the African coast on of Portuguese navigators.

In the modern age the beginning of the called "modern tourism" is going to initiate in England in the days of economic bonanza. Young aristocrats belonging to wealthy families who travel to other places and countries to acquire new cultural and intellectual knowledge. These trips were denominated as "horseman trips" lasted several years and contributed social status.

In the industrial era, the man stopped being agriculturist and retailer and becomes industrialist. It is the moment when great industries and new urban nuclei arise, therefore the trips consist the displacements from the field to the city in search of work. The appearance of the railroad for the displacement of the people is important.

In this era of mobility, where there is a great growth of the trips and the tourism. To travel begins to become something fast, comfortable and safe thanks to taken efforts by countries like France and England that an important development of the aerial and terrestrial transport excepting the period of the two world wars, where displacements are by deportations political, reasons and scaping from the hunger and the poverty.

In the period of the cold war, it is when the called tourism from masses arises, by the following reasons:

- Reorganization of Europe
- Political peace
- The development of automobiles and airplanes
- The low cost of the gasoline
- Aerial Liberalization
- Improvement in the state of the well-being
- New infrastructures and communication channels
- The appearance of own organisms at national and international level, among others.

In the decade of the 80's, people begin to have better economic resources and the tourism becomes the economic motor of the majority of the countries of the world. There are great advances as far as the aerial transport, with the appearance of fast airplanes like the "Concorde" and as far as the terrestrial transport the discovery of the trains of high speed. Also the arrival of the Internet is very important that is going to allow to the tourist new products and a service much more comfortable and flowed.

In the decade of the 90's political conflicts appear that affect the tourism directly like; the recent fall of the wall of Berlin, the Gulf War, the fall of the communist regimes and the Yugoslav conflict. By the others in this decade new tourist destinies arise, new products and a new type of tourist to whom it does not matter to pay for more, if the quality is better Maastricht Agreement 1992, is going to be very important. Where is approved the free circulation of people and merchandize. New tourist companies arise that offer low cost products and services to a low cost.

The tourism at present "21st century" has important challenges to fulfill facing the future as they are;

- To turn to the trips and the tourism into a strategic and economic priority for the creation of employments.
- To look for open and competitive markets.
- To look for a sustainable development.
- To look for a fast growth
- By the others, we do not have to forget that the global heating this creating great damages to the world-wide tourism, therefore we must protect the environment and its cultural inheritance of the uncontrolled growth of the tourist activity. (Acerenza. 2006)

Concept

According to Oscar de la Torre Padilla the tourism is “the tourism is a social phenomenon that consists of the voluntary and temporary displacement of individuals or groups of people that, essentially on the occasion of recreation, rest, culture or health move from their place of habitual residence to other, in which people do not carry out no lucrative nor remunerated activity, generating multiple interrelations of social, economic and cultural importance. (Belle Gurría Di-, Manuel.1991)

The World-wide Organization of the Tourism defines to the tourism as “a dynamic phenomenon (the trip) and a static phenomenon (the stay); an activity of masses and an individual experience; an agent of landscaping devastation and a route of preservation or rehabilitation of cultural spaces.” And they defines also it as “the tourism includes the activities that the people realize (tourist) during their trips and stays in places different from the one from their habitual surroundings, by a period of consecutive time inferior to a year, with aims of leisure, by businesses and other reasons...” (World-wide Organization of the Tourism, 2008)

According to SECTUR (Coronado M. Loreto, 2008) it is a favorable social phenomenon that has an economic impact for the receiving communities, and that consists of the displacement of people by different reasons, from his point of fixed residence to other places where it is constituted in the floating population of that place, without participating in the work markets and by more than 24 hours and less than 6 months. (Coronado. 2008).

We conclude after the exposed thing that the tourism is “the activity by which the people without any language, sex, race and religion distinction travel to a place different from their habitual residence looking for mainly tourist and non lucrative aims and whose stay must be more then 24 hours but of hrs and less than six months”.

Characteristics

The tourism in the last years has become not only a recreational and vacacional necessity but also an anthropological and social necessity.

The tourism has stopped being something elitist to become a communication vehicle and escapes for all the social sectors of the population. The tourism nowadays this beginning to see the tourist like a consumer of goods which requires that the tourism acquires a vision and way different from last times, so that the tourist no longer only looks for to know a distant place if not that also a perfect organization requests and service of quality in all the elements that constitute the process of their trip and stay. All this has caused that in the last years of century XX new organisms have arisen from the tourism that look for adapting to the new needs and exigencies of the tourist. In relation to this it was very important agenda 21, that was

constituted after the meeting held in Rio de Janeiro in 1992, it was a meeting for the United Nations signed by but of 182 countries and whose objective is to look for the preservation and development of the tourism and the environment.

In this Agenda 21 it was concluded the necessity to create and to start up new environmental political that reduce cost, that continue being attractive for the tourist, that half environmental look for a viable development and that they do not try to reach commercial aims.

Also it about the importance of the publicity, in the sense of the necessity to project videos in the airports, to put informative warnings in tickets of airplane and luggage of hand, to facilitate tourist readings and pamphlets on board. It comments that the trips and the tourism must try that the human being live peacefully and harmony with the nature. The balance of the earth must be looked for. The trips and the tourism must create employment for the women and indigenous population. In addition the trips and the tourism must obey and respect the international laws on the protection of the environment.

Finally *Agenda 21* comments on the necessity of a correct reusability and recycling of the residues a sensible consumption of the energy, to reduce the contamination and to avoid in the maximum possible the contamination of rivers and seas.

An important characteristic of the tourism is the recreation; because tourists look for to escape themselves of the routine and to find new places where they can develop activities different from the habitual ones that could. Contribute to a combination of rest, entertainment and dynamism to them, as well as to foment intercultural contacts.

Certain characteristics exist that must reunite the recreation activities, such as;

It is a voluntary activity in the free, time, it is not utilitarian, Pleasant, it is not antisocial, scientific, artistic, political, technical, cultural, educative, sport and tourist. (Zamorano. 2008).

The tourism has another very important characteristic that it is the contribution to the evolution of the social level of a great number of inhabitants of the visited territory. This contribution, already important in the developed countries in which it is considered that 5% between and 7% of the active population live on the tourism, it is still, significant in the developing countries, in which the tourist economic special demand extends to an increasing number of craftsmen and employees. (Haulot,Arthur.1991.).

Types of Tourists

In the present times due to the great dynamism that has acquired the tourist activity, the following types of more common and representative tourists have been catalogued:

Masses of organized Tourists: They are those tourists who completely plan and organize their trip before leaving. They like to contract tourist packages that they include absolutely all the necessary so that the trip and the stay is pleasant and without disadvantages. These tourist packages include transport, lodging and diverse activities they are made by a travel agency and tour operators.

Mass of individual tourists: They are those tourists to whom they do not like to have the completely planned trip, also go to travel agencies but they only contract to transport and lodging and the rest of activities are done in the destiny and according to they lifestyles and customs. In other words, they do not like to realize a trip or tourist stay surrounded by other groups of people, and they look for major freedom of decision and movement.

Businesses Tourists: They are those tourists who move by labor or professional reasons. That's means, they travel in representation of some company to go to meetings, conferences, congresses, or to establish some type of business. These tourists characterize themselves because their stay is short and usually spend much money in the places that they visit. Therefore they are very important tourist to fortify the tourist economy.

Tourists stimulated by their companies: They are those tourist that are award with or travels or vacations by their company like gratefulness by his punctuality, fidelity, seriousness and commitment. Thank to this these companies sign agreements with companies of incentives to organize of periodic form tourist packages appointed to those employees who excel of the rest.

Tourists Majors: They are those tourists majors of 55 years that have been broken contact with their companies and therefore have long free time to dedicate it to the trips of pleasing. Nowadays due to the diminution of the rate of natality in the developed countries, causing a greater absence of young tourists, originate that major tourists and interesting to maintain and to fortify the tourist market.

International tourists: They are those tourists who travel to other countries and other continents, looking for cultures and different customs of life. Thanks to these trips these tourists to long distances help to foment the interpersonal relations between different human groups, letting grow to the called social tourism.

Exploratory tourist: It is that tourist loving of the freedom risk and the Bohemian life. This tourist likes to visit places but without any previous preparation of its trip. They like to be with new things and to relate whit the people that they meeting they way. They are extroverted and loving of the encounter and the dynamism in all slopes, they can contract their trips in an agency.

Vagabonds or Nomads: They are those tourists who travel with the back pack the shoulder, do not lodge in hotels because they look for the economic lodging, like for example, cabins,

shelters and camping. In order to move they use transport of third category. These tourists characterize themselves so that they spend the smaller possible money, since they do not have a favorable economy. According to the PLOG model, which suggests that a community can enter the tourism business with the arrival of a small number of adventurous tourism allocentric or psicocentricos, we can classify to all the types of previous tourists in only two groups that are the following:

- The allocéntricos, that are those travelling lovers of the risk the adventure and the unpredictable thing.
- The psicocéntricos are those travelling lovers of the security, stability and organization in their trips. (Acerenza, Miguel Angel. 2006).

Eco-tourism

We define to the eco-tourism like “the activity that the tourists realize looking for interacting, to appreciating and taking care of the nature, finding in her it fun, relaxation and the experience to venture itself to know the wonderful natural beauties that we found in the world.

We reach this conclusion due to the revision of different definitions;

The World-wide Organization of the Tourism defines to the eco-tourism as “all the forms of tourism in which the main motivation of the tourist is the observation and appreciation of the nature and that contributes to the conservation of the natural surroundings and the Cultural Patrimony with the smaller possible negative impact” (World-wide Organization Of Tourism 2008).

The Secretary of Tourism defines to the Eco-tourism or Tourism of Nature like “the cultural trips that have the aim to realize recreational activities in direct bonding with the nature and cultural expressions that surrounds with an attitude and commitment to know, to enjoy and to participate in the conservation of the natural and cultural resources “. (Secretary of Tourism. 2008)

The Society of the international Eco-tourism, in 1991, gave the following definition; “Eco-tourism is the trip responsible of the natural spaces that conserve the environment and sustain and it, benefitting to the local people” (Blanco Portillos. 2008)

The IUCN – International Union for the Conservation of the Nature defined in 1996 that the eco-tourism was “an environmentally responsible trip to the natural areas relatively little altered, with the aim of enjoying and to appreciate the nature and to promote the conservation, being in a low impact of the visits and providing advantages in an active encirclement socioeconomic of the local populations.” (Blanco Portillos .2008)

Importance

At world-wide level, the developing countries, the tourism directed towards the natural spaces and eco-tourism, is becoming a more and more popular activity, because as much national visitors as international, occupy these special places. For the conservationists, this growth is reason as much for enthusiasm as of preoccupation.

The eco-tourism can generate highly necessary income for the local and regional economy, a greater consciousness about the importance of the environmental conservation, as well as new incentives so that the governments and inhabitants inside and outside these areas preserve, them. At the same time, the demands imposed on the ecosystems and the natural resources, due to the increase of the tourism, can destroy the attractions and the pillars of support of the local economy. For it, the development of the eco-tourism with wisdom, represents an enormous challenge.

In summary, from a purely economic point of view, the eco-tourism allows:

- To adopt more profitable economic models to the regions of low rent.
- To generate quickly direct and indirect employments of permanent form and.
- In the long term to replace quickly predatory activities of the environment, injurious for the local economy, such as the international fires, the deforestation, selective of noble wood harvesting, the work in the mines, the hunting and the excessive fishing.
- To fortify the local economy through the micro and small company, cooperatives and organizations for charity.
- To provide something to the visitor more than the mere diversion, increasing to him value to the life, promoting the environmental education and confirming the thesis of which it is only conserved what it is known.
- To valorize the local culture, assuring its perpetuation by the new generations.
- To diminish the pressure on the natural areas, generating resources to conserve them and demonstrating to the local communities the importance of doing it, because they make possible the attraction of visitors coming from very distant places, which is in the valuation of its natural state.
- To value the action of the scientific research, the organizations for charity and the efforts of environmental education and conservation of the environment.

Nevertheless, when analyzing the consequences of the eco-tourism, it is concluded that the potential benefits, economic as well as environmental, are about to be realized. In the majority of the cases, the area of excellent ecological value and very visited, has been developed little and it does not count with a certain infrastructure to maintain it. These areas lack of specialized professionals for the tourism, interpretative information and basic infrastructure as center of visitors (often are not lodgings in their interior). Like result, opportunities to attract money are lost and to provide with use the local community.

The general positive aspects of the eco-tourism offer opportunities to expand the economy from a region to a relatively low cost, on the other hand, highly desirable in a region. It is an open market and it counts on few protectionist norms. In addition, it is an activity that has an ample phantom of action in areas and isolate peripheral regions, stimulating therefore the economy.

The general negative aspects of the eco-tourism also are evident, due to the instability that generates its fragile nature to it. For example, when an important flow of tourists exists, a great environmental degradation is demonstrated, due to the difficulty to establish the balance of the relation cost benefit.

The person who also realizes eco-tourism must have certain characteristics; they are people who travel to rich atmospheres in landscapes and cultural goods, with the aim of appreciating her beauties and their attractiveness. They are those who are prepared to pay to enjoy the pleasure to maintain contact with the nature, with the customs and traditions of the region. Surely they will be more interested in knowing the location of the rivers, of the routes, the names of the plants and animal of the place, than in worrying about the equipment and infrastructure of the hotels, so outstanding in the tourist propagandas. They use to taking advantage of every minute the time that is abroad in knowing details of the landscape and appreciating the contact with the inhabitants of the place.

They can like the adventures, be accustomed to cross footpaths difficult and to look for emotions in the rapids of the rivers and the mountain climbing. However, also it can be more contemplative, preferring a certain isolation instead of the company of noisy groups, to walk without a hurry by the places that they visit, stopping to observe the surroundings and details of the vegetation, the animal and rocks.

It feels curiosity to know histories and legend, to acquire typical memories and to taste variable meals. They always consult the support of the guides and are interested in maps, pamphlets and other publications that provide good information to them. It can also be a specialist, prepared to face long and difficult long walks by the pleasure to observe the nature, integrated to the environment, object of its investigations and studies.

They are interested in the environmental changes of the planet and, therefore, they worry in contributing, to the maintenance of the natural resources and to the balance of the

ecosystems. This consumer has acquired consciousness that they are not free of fault and begins to question about how they obtain and produce the products that consume. This phenomenon seems to be a new tendency of market, as, the humanity is frightened with alert on environmental misfortunes.

The ecotourist only is not worried about the quality of the atmosphere, but also it calls his attention, the quality of life of the local community, and many times they are ready contribute, interacting or consuming local products. They are examples in Europe of visitors who return to the visited to conduct voluntary battles to benefit the community. (Martín Gil. F. Eco-tourism 2008)

Tourist Attractions:

The national tourist attractions are integrated of the following way:

Geomorphologic attractions: they are those formed by the action of the nature during the evolution of the planet.

1. The coasts
 - Rocks
 - Beaches
 - Cliffs
 - Mouth of rivers
2. Lagoons and water tanks
3. Water currents
 - Superficial (cayons and cascades)
 - Underground (flowing, waters, natural wells)
4. Volcanism
 - Craters
 - Thermal and mineral waters
 - Geysers
5. Terrains
 - Mountains
 - Ravines and canyons
 - Plains
 - Dunes

Attractive biogeography: they are those with manifestations of animal or vegetable life.

1. Vegetal groupings
 - Forests
 - Woods
2. Animal groupings
 - Wild Fauna
 - Zone of hunting

All can appear of mixed way, apart from which many of these attractiveness require of the intervention of the man for their conservation, maintenance and accessibility. Within these attractiveness it is possible consider in general to the meather, since many displacements are therefore made. The touristic attract are very important, because they allow to attract people of different places and with different forms to think and to see the life, taking place a magical interconnection among them, filling of life and dynamism to all a region or tourist destiny.

According to the tourism secretary (SECTUR), it is all place, object or event able to generate a displacement tourist. That is to say, the beauty is so much or importance of that attractiveness, that people who live in other places (tourist) travel to enjoy it. Tourist attractions can be enjoyed in different ways, according to the interest of the tourist. This makes possible that besides the traditional "Tourism of Sun and Beach", different types from tourism exist like:

Cultural tourism: to travel to know and to include/understand other colonial cultures, cities, magical towns, archaeological zones, popular museums, monuments, gastronomy, celebrations, crafts, dance, music...

Eco-tourism: to travel to realize activities of appreciation and knowledge of the nature through contact with the same, like the observation of flora, birds, whales or of ecosystems, liberation of turtles...

Tourism of Adventure: to travel to realize associate recreational activities to surpass challenges imposed by the nature like: diving, reduction in rivers, mountain kayaking, hiking, scaling, long walk, rappel, cavalcade, cycling, parachuting, balloon flight, wing delta or hang-glider.

Attractive tourist the cultural ones; they are those elements in which the human action in historical happening takes part or has taken part, or settle down for cultural or commercial reasons. According to Ana Garcia Silberman, it is possible to be classified of the following way: (Gurría)

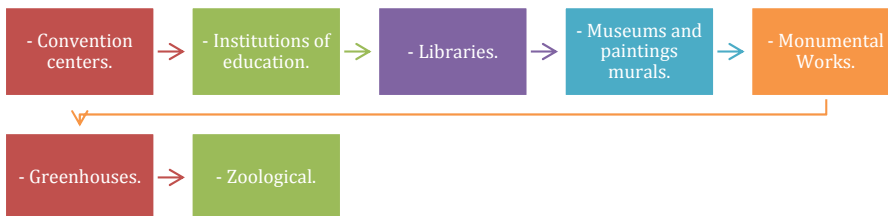
1. Attractive historical: they are as much the works that have left the civilizations, like the places that a meaning in the sociopolitical history of the towns, nations has and religions.

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Generally, it has permanent character; breadfruit among them obtains data with relative facility, and who are of manifestations that study many branches of science.



2. Attractive contemporaries; they are those manifestations of a country or region that conserve and foment their cultural patrimony; which is a reason for pride for they can show those who it and an attractiveness for want those who it to know and to enjoy.



3. Attractive contemporaries (commercial)
4. They are those manifestations by public or deprived groupings that, generally, has temporary character, is created to attract visitors offering to them distraction, relaxation, mechanical, health, etc.

- Parks of diversions.

- Bath.

- Cultural Spectacles.

- Sport Fields.

- Ex- national and international positions.

- Markets of crafts.

- Commerce.

- Centers of health.

- Fairs and carnivals.

- Religious Celebrations.

- Casinos.

- Contests and competitions

(Gurría I gave Beautiful Manue, 1991).

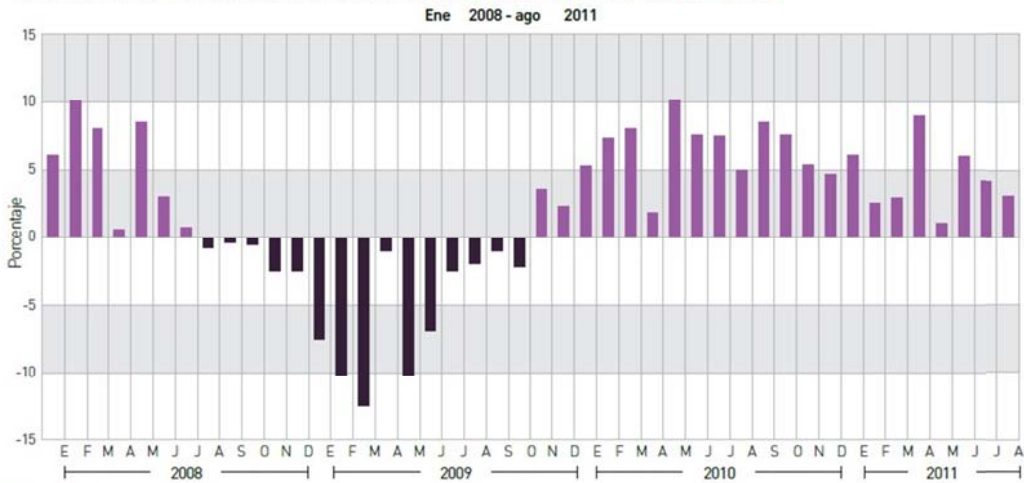
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As conclusion can be affirmed that if a certain place or region has several attractive tourist ones of diverse nature, a tourist route is needed to create surroundings to them planned good, that allows the tourist to cross of form ordinate and stepped each of these attractiveness, so that it can perceive each detail and tourist wealth of all that crossed space, fomenting an elegant and delicate relation between the visitor and the surroundings, directed to a greater respect by the habitat and to a greater understanding about other people and landscapes.

6. TOURISM INDUSTRY WORD WIDE.

In a turbulent world is not easy to think that people want to travel (year 2009 depression), terrorism, wars, invasions, interventionism, security, health and many other important factors had been lead to paralysis, stopping the tourism machinery and industry around the world. The recovery and projections are not bad (Figure X), all the time the market recover the lost for all continents. The GDP show up that many countries shares a very important role in their economies.

Evolution of international tourist arrivals in the world



Gráfica 3.1. FUENTE: elaboración propia con datos de la OMT.

Figure X. International Tourist Evolution (arriving's World Wide W).

“As of 2010, the global travel industry contributed 9.2 percent of the world's total gross domestic product, according to the World Travel and Tourism Council. People travel for work, to visit family and friends and for pleasure.” (2)

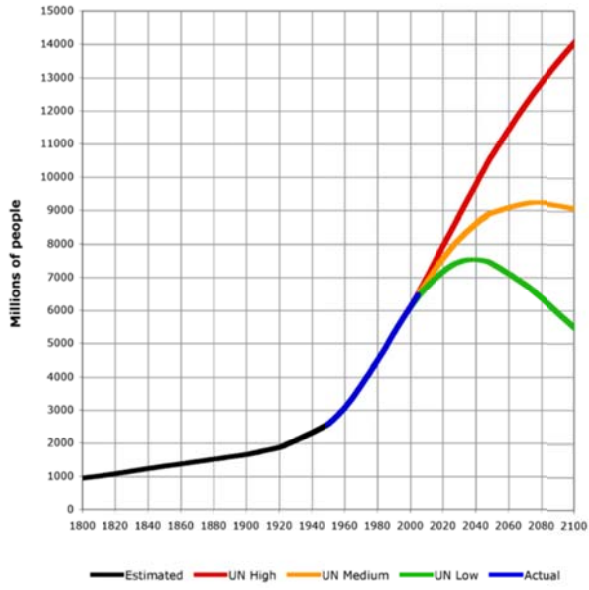
This is a powerful industry where the main raw materials are attractions, natural resources, architecture and culture where customers are simply part of the human been changing their behavior from thinking travel by luxury become just necessary, and a heavy trend is the demographic explosion (Figure Y) showing up strong curves of population, more people means more travelers.

Figure Y. Population Trends, projected demographic explosion

Comentario [EvESL17]: Checar el dato que le corresponde

Comentario [EvESL18]: Es una cita??

Comentario [EvESL19]: Que el título vaya muy cerca de la gráfica



In 2010 the projections about tourism growth had been confirmed 3.2%, and global emerging of more travelers as well with a 2011 with 4.4% (figure Z) moving 980 Millions of people around the world.

TÍTULO DE LA TABLA

Comentario [EvESL20]: TITLE!!!!

UNWTO World Tourism Barometer																				Volume 10 • March 2012					
International Tourist Arrivals by (Sub)region																									
	Full year					Share (million)	Change (%)				Monthly/quarterly data series (percentage change over same period of the previous year)														
	2000	2005	2009	2010	2011*		2011*	09/08	10/09	11*/10	2011*											2010			
	YTD	Q1	Q2	Q3	Q4		Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4											
World	674	797	881	939	980	100	-3.8	6.5	4.4	4.4	3.7	6.5	4.4	2.9	5.3	3.1	1.9	3.6	6.9	7.3	7.0	6.1			
Advanced economies	417	453	474	498	522	53.3	-4.3	5.1	4.7	4.7	2.9	6.2	4.9	4.3	5.9	4.4	4.3	4.2	4.7	5.6	5.3	4.4			
Emerging economies	256	344	407	440	458	46.7	-3.2	8.2	4.1	4.1	4.6	6.9	3.6	1.5	4.6	1.6	-0.2	3.0	9.2	9.3	9.3	7.9			
<i>By UNWTO regions:</i>																									
Europe	385.1	438.8	461.1	474.6	502.3	51.2	-4.9	2.9	5.8	5.8	5.1	8.7	5.1	4.0	6.4	4.8	2.8	3.8	1.5	2.5	3.8	4.6			
Northern Europe	43.7	57.3	57.8	58.2	61.4	6.3	-5.1	0.5	5.5	5.5	5.2	11.0	4.1	1.1	7.0	-0.3	-1.1	5.5	-4.6	-1.9	3.4	3.4			
Western Europe	139.7	141.7	148.5	153.8	158.1	16.1	-3.0	3.6	2.8	2.8	2.9	3.9	1.6	3.7	2.1	3.9	3.6	3.5	2.3	4.1	4.2	2.6			
Central/Eastern Eu.	69.3	87.5	90.2	93.6	101.0	10.3	-9.9	3.7	7.9	7.9	9.2	11.9	5.8	5.7	5.6	5.7	5.3	6.0	0.4	4.0	5.2	10.1			
Southern/Mediterr. Eu.	132.5	152.3	164.5	169.0	181.8	18.5	-3.5	2.8	7.6	7.6	4.8	10.4	8.3	4.1	10.2	6.8	2.0	1.6	4.0	1.8	2.8	3.2			
- of which EU-27	323.6	349.2	353.9	362.5	381.9	39.0	-4.6	2.4	5.4	5.4	4.1	7.8	4.9	4.1	6.0	5.0	2.6	4.3	1.2	1.7	3.2	3.2			
Asia and the Pacific	110.1	153.6	181.1	204.5	217.1	22.1	-1.6	12.9	6.1	6.2	4.3	5.7	7.6	6.8	6.1	5.9	6.6	7.9	13.5	15.8	14.3	8.7			
North-East Asia	58.3	85.9	98.0	111.6	115.9	11.8	-2.9	13.8	3.8	3.8	1.9	0.9	5.1	7.3	5.2	5.2	8.9	8.0	11.4	21.1	15.6	7.9			
South-East Asia	36.1	48.5	62.1	69.9	77.1	7.9	0.5	12.5	10.4	10.4	8.0	14.3	13.0	6.8	8.5	6.6	4.1	9.3	16.8	10.1	13.6	9.8			
Oceania	9.6	11.0	10.9	11.6	11.7	1.2	-1.8	6.1	0.8	0.8	-0.5	0.5	0.1	3.0	-0.6	4.3	2.6	2.5	6.7	4.1	8.5	4.8			
South Asia	6.1	8.1	10.1	11.5	12.4	1.3	-1.5	14.0	8.0	8.3	8.3	11.2	8.3	6.6	7.6	10.1	5.4	4.8	20.9	10.7	11.0	13.9			
Americas	128.2	133.3	140.7	149.7	156.0	15.9	-4.9	6.4	4.2	4.2	4.0	6.1	3.5	3.3	5.2	0.7	4.5	4.6	4.2	7.5	9.1	4.1			
North America	91.5	89.9	92.1	98.2	101.0	10.3	-5.7	6.5	2.9	2.9	1.2	5.3	2.9	1.9	4.9	-0.8	3.0	3.5	3.9	9.6	8.6	3.3			
Caribbean	17.1	18.8	19.5	20.0	20.7	2.1	-2.7	2.6	3.6	3.6	3.6	4.9	2.5	3.3	3.7	-0.6	5.0	4.5	4.7	0.1	3.6	1.1			
Central America	4.3	6.3	7.6	7.9	8.3	0.8	-7.4	3.9	4.8	4.5	4.5	4.5	3.3	5.6	5.9	2.3	7.0	6.8	1.6	5.2	6.7	2.8			
South America	15.3	18.3	21.4	23.6	26.0	2.6	-2.3	10.0	10.1	10.1	12.6	12.6	7.6	7.7	7.8	6.9	8.6	7.7	5.6	5.8	18.6	10.2			
Africa	26.2	35.0	46.0	49.9	50.0	5.1	3.5	8.4	0.2	0.2	4.8	-1.3	-2.6	1.0	2.5	-0.2	2.2	1.0	11.9	10.9	5.7	10.3			
North Africa	10.2	13.9	17.6	18.7	16.9	1.7	2.5	6.5	-9.9	-9.8	-9.8	-10.1	-11.9	-6.2	-0.3	-8.3	-3.4	-6.4	10.8	4.3	4.1	9.4			
Subsaharan Africa	16.0	21.0	28.5	31.2	33.1	3.4	4.1	9.6	6.2	6.2	11.4	4.2	5.2	4.5	4.2	4.6	4.8	4.2	12.4	15.2	7.0	10.8			
Middle East	24.1	36.3	52.1	59.9	54.8	5.6	-4.6	14.9	-8.4	-8.4	-7.9	-2.2	-6.7	-16.2	-5.2	-12.6	-18.8	-16.2	22.5	21.5	18.7	8.1			

Figure Z. (3) Distribution of arrivals per region

Statistics show up that travelers are interested about visiting developed countries but with high interest and growing rate to visit emerging economies (Figure W)

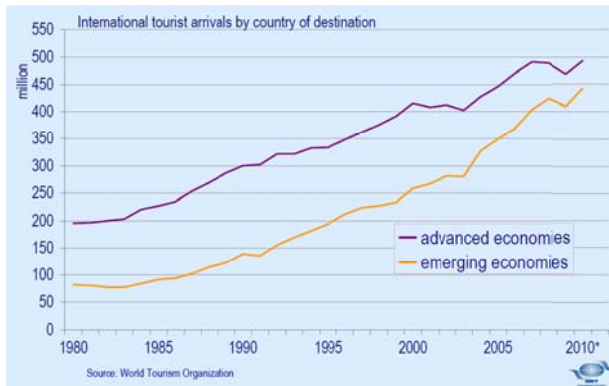


Figure W. (4) Market share preferences.

Comentario [EvESL21]: CAMBIAR EL ORDEN e identificar bien las referencias

7. ANALYSIS OF FIVE INDUSTRY FORCES

Prior to the global analysis, we review the five forces that determine the same opportunities and threats (ie, external). The Diamond comprehensively analyzes the strengths and weaknesses (internal conditions).

Comentario [EvESL22]: Mejorar la redacción de esta parte, que es lo central del análisis de cluster.

THE 5 FORCES

Threat of entry

Advantage of established players, regardless of size.

The tourist may no longer be so open to new business (the capital). It would require developing new tourist areas.

Unequal access to distribution channels.

The power is average, and will depend on the specific service you choose.

Benefits of scale on the side of demand. There are a wide variety of prices and services, focused segments also varied.

Costs for customers to switch suppliers.

Capital requirements.

Power of suppliers:

Is half in: Travel Agents, Resorts and recreation, museums, convention centers, archeological sites and recreation, Zoo, universities, historical and religious monuments.

The power is half as Puebla compete with beach destinations, heritage cities, colonial cities and tourism business since the capital is very close.

Power of buyers:

Is high, in the city of Puebla, being very wide tourist offer they determine which one to choose, which can result in low prices. Into the State's offer is much more limited.

Substitute services:

Internet with virtual tours.

Rivalry:

High among existing competitors: Hotels, restaurants and transportation. Into the state there is less rivalry.

Comentario [EvESL23]: Poner uno o de párrafos introductorios. AGREGAR la imagen

8. VALUE CHAIN (SUPPORTING INDUSTRIES)

The supporting industries are hotels, restaurants, transportation, and tourist attractions and natural resources.

Comentario [EvESL24]: Incluir la cadena de valor en esta parte!!!!!!!

9. RELATED INDUSTRIES

Among the industries related to tourism enterprises have to Ecotourism, zoos, museums, conventions centers, international airport, archeological zones, colleges and universities, hospitals, financial services, cultural and spot facilities, travel agencies, tourism operators, handcrafts

10. COLLABORATING INSTITUTIONS (PROFESSIONAL, EDUCATIONAL, GOVERNMENT)

As for the existing infrastructure to boost tourism industry in Mexico, there is the Ministry of tourism to national and state levels. At municipal level Directorates of Tourism there.

By private initiative in the area of hotels and restaurants, have made different chambers: the Chamber of Commerce and Tourism Industry, the Association of Hoteliers, the CANAPAT (National Chamber of Road Transport) and CANIRAC (National Chamber of the Restaurant Industry CA).

Among the plans and programs to boost tourism is the National Agreement for Tourism, created in 2011, attended by government and business sectors and 10 strategic lines were generated through 101 shares.

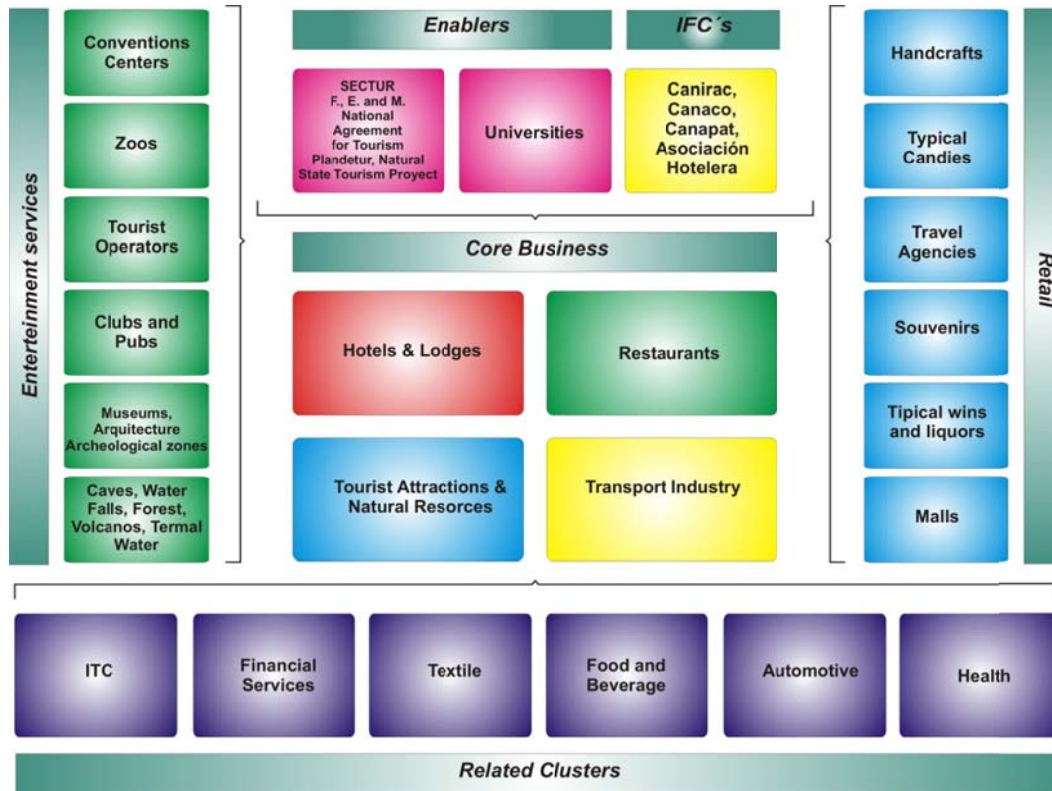
In Puebla there statewide Nature Tourism Plan, which focuses on development throughout the state, in those municipalities and tourism-oriented with a vision of sustainability, competitiveness and diversification.

Specifically in the city of Puebla works since 2007 in the Plandetur, focused only on the Angelopolis and which is currently working the Tourism Council.

The continuity between plans and programs are more often interrupted by changes of government.

Besides the government institutions listed above, we find many public and private universities offering tourism-related programs at technical, undergraduate and graduate students.

11. CLUSTER MAP



12. DIAMOND RELATED TO THE CLUSTER

Factor conditions:

Puebla is an important state in economic matters. It is strategically located 120 kilometers from the capital city with a temperate climate.

Third Safest State for international visitors in México. (San Francisco Chronicle, E.U., Nov.19th, 2011)

Puebla State is one of the safest cities in Mexico, according to Índice de Víctimas Visibles e Invisibles de delitos graves (IVVI) of México Evalúa organization

Existence of industries attracting business tourism (Automotive, textile, health, and education sectors)

State capital scope

2nd in the ranking of cities with large number of universities.

Is 6th in the national ranking of favorite destinations to study. (Consulta Mitozky, Feb 14th, 2012)

Puebla is 13th in the ranking of the 45 places to visit in the world in 2012. (The New York Times; January 6th, 2012)

23rd in the ranking of best cities for doing business in Latin America. (América Economía Magazine, 2012)

Infraestructure:

State scope:

Highways and roads to the center, north and southeast of the country. (Some of them in bad conditions)

International Airport (underutilized).

State capital scope

Urban landscape and main highways, roads, and streets in bad conditions.

Diversity of room accommodation (prices and level)

Puebla's convention center, one of the biggest in the southeast of the country.

- Archeology
- Magic Towns (Pueblos Mágicos).
- Religious Architecture.
- Culture (Legends, traditions, crafts and museums).
- Gastronomy (Typical food, candies, and wines).
- Incoming events:
 - "Mole" international festival (May 2nd; Rick Bayless, international chef participation)
 - 2012 "5 de Mayo International Festival".
 - 2013 Tourist Convention and Business Summit.

- Protected nature reserves.
- Adventure tourism(water, air and ground): rafting, camping, mountain biking, rappel, fishing, gotcha, diving.
- La "Capilla del Rosario" (Rosario's Chappel), 8th baroque wonder of the world.

•Puebla's city historical center, one of the world architectural treasures and cultural heritage of humanity (UNESCO).

Human Resources:

- Skilled labor in the touristic sector and related industries.
- Colleges and University with technical, undergraduate and graduate programs.
- People's lack of tourist vocation.

Demand's Conditions:

Tourists from Mexico City 19.80%, Veracruz 9.30%, México State 6.20%, Querétaro 6.20%, Oaxaca 4.30% and countries like United States 27%, Argentina 13.50%, Germany 8.10%, Canadá 8.10%, Colombia 8.10%.

Health Tourism (1251 health units, spas and hot springs).

Business Tourism (Presence of multinational companies like Volkswagen, MABESA, Coca Cola, Adams, Bimbo, Ternium).

Student Tourism: 28,800 of educational service units.

Related and supporting industries

Air Transportation (3 airlines; 1 international, 2 domestic) and ground transportation(ADO and Estrella Roja, the most important).

Hospitality industry (14,807 rooms), Restaurant industry, Malls and retail industry, Travel agencies, Tour operators, Museums (14 in the state and 30 in Puebla city), churches, 5 archeological zones, natural areas, Financial services, 1251 health units: 1096 public and 155 private; Universities; 1685 leisure, recreational, natural and sport service units; Construction and maintenance industry; Business chambers and NGO's.

Context for Firm Strategy and Rivalry

High rivalry in hotel industry; restaurant industry; among diversified and wide tourist wealth, and with other states of the country.

Chance

Geographic location.

6 archeological zones in different state locations.

Popocatepetl volcano conditions and seismic zone, decreases tourist traffic.

Continuos Economic crises in the country.

High level of organized crime in the country and incidence of crime in Puebla State and Puebla City.

13. ROLE OF GOVERNMENT

•State Tourism Ministry is promoting the Puebla positioning through the 5 de mayo Festival, mainly in the hispanic population in the United States.

Promotion of denomination “pueblos mágicos”.

•Promotion to attract international events.

•Infrastructure investments (Business and Convention Center).

•Lack of information in the tourism web pages.

•“Acuerdo nacional por el Turismo”, participating the federal government, private sector, state governments, and education sector. 101 proposals in 10 strategic plans.

•Low coordination among the different government levels.

•Creation of the “Puebla” brand. Inefficient because has changed according to the government in place.

•Low budget for Tourism Sector: \$85, 959,937.28 (total government Budget is 57,874,200)

•Scarce of coordination between the state and municipality tourism plans.

14. STATE OF CLUSTER DEVELOPMENT MODEL EVALUATED TUNING.

It is a natural cluster where joint strategy has failed because they have not yet found the projects to detonate and give support to the industry.

15. RECOMMENDATIONS FROM THE ANALYSIS, PROJECTS DETONATORS

Detonator project involving shared value

1. Institution for Collaboration

We propose a Tourism Promotion Council, to coordinate, design and implementation of strategies to promote tourism to local and state levels. Achieve comprehensive and

competitively promote Puebla, with its products and destinations, national and international markets through the joint efforts among all stakeholders in tourism, which allows their participation and combined efforts.

It is proposed to work in three main areas:

- **Research**, new technologies and tourism offerings and how they can make sustainable development in communities.
- **Program development and promotion**. Develop programs and promotional campaigns Tourist consistent and permanent in time. The key is that marketing campaigns in Mexico and abroad with a single line strategic and tactical one unique selling proposition, one logo and slogans approved by state and municipal governments, since the mark covers the entire state Puebla and the capital city of the same name.

The marketing mix should be focused on specific segments seek to avoid dispersion of the campaigns.

- **Sum of efforts**. Promote coordination schemes to multiply the efforts of different actors promoting touristically to Puebla in the source markets, to generate economies of scale and competitive advantages for all actors involved.

Would be a voluntary and open to all involved in some way to tourism, which seeks the implementation of best practices in tourism management, based on information and experience exchange, implementation of new technologies, conducting audits and collaboration with governments and other actors.

The positions are honorary Advisory Council and therefore, its members would not receive remuneration, emoluments, compensation or retribution for their performance.

2. **Natural Tourism.**

Travel by Nature Tourism show an annual growth between 25% and 30% versus 4% annual growth in the number of international arrivals worldwide (WTO). The nature tourism generates 7% of international tourism expenditure and contributes to the acquisition of approximately \$ 223 billion, income from various countries.

We propose as a detonator project to generate shared value nature tourism within the state. This project is already raised by the Ministry of Tourism of the State of Puebla and is called "nature tourism Plan Puebla State 2007-2020"

The program is based on three strategic objectives: Competitiveness, Diversification and Sustainability

Among the proposals under this program is the strategy of "promote the generation of clusters in major tourist destinations in the state, integrating companies and institutions that interact with each other to create a business climate that elevates your

performance, competitiveness and profitability long term (" Plan of nature tourism in the State of Puebla 2007-2020 ", p.26)

- Have a joint program of competitive tourism clusters.
- Inventory of services, equipment and infrastructure which has the state of Puebla to integrate clusters.
- Promote the participation of companies of products and services, suppliers, financial institutions, education and training, as well as to firms in related industries or complementary to the integration of clusters.
- Create a system of indicators to measure progress and results of the generation and operation of the clusters.

The Nature Tourism generically comprises the following ways:

1. Ecotourism. Interpreted as the trips are intended to recreational activities appreciation and knowledge of nature through contact with it.
2. Adventure Tourism. Includes trips are aimed at the recreational activities associated with challenges posed by nature.
3. Rural Tourism. Related trips are intended to carry out activities of coexistence and interaction with a rural community in all those social expressions, cultural and daily production of it.

We define to the eco-tourism or Natural Tourism like "the activity that the tourists realize looking for to interact, to appreciate and to take care of the nature, finding in her it fun, relaxation and the experience to venture itself to know the wonderful natural beauties that we found in the world.

The Secretary of Tourism defines to the Eco-tourism or Tourism of Nature like "the cultural trips that have the aim to realize recreational activities in direct bonding with the nature and cultural expressions that surrounds with an attitude and commitment to know, to enjoy and to participate in the conservation of the natural and cultural resources ". (Secretary of Tourism. 2008)

The natural tourism can generate highly necessary income for the local and regional economy, a greater consciousness about the importance of the environmental conservation, as well as new incentives so that the governments and inhabitants inside and outside these areas preserve, them. At the same time, the demands imposed on the ecosystems and the natural resources due to the increase of the tourism, can destroy the attractions and the pillars of support of the local economy. For it, the development of the nature tourism with wisdom, represents an enormous challenge.

3. **Develop Mark *Puebla***

Define the mark of Puebla to promote it. The brand-city is the name of the city, which is associated with a series of unique and exclusive attributes that can identify, recognize and differentiate this city from others. A city brand has to be used as a symbol of his personality and must be associated with a series of assets and existing urban resources and values associated with the model of the city and a significant attractiveness.

Talk about brand for a city is more complicated than for a product, service or company; involves a number of "shareholders" much greater population, politicians, businessmen, artists, tourists, journalists, potential foreign investors and officials public administration.

If the basis of a successful city is its unique positioning and differential, the difficulty arises because most of the cities is not identified with a single value, but with many, some of which also are shared by different cities. .

You need to determine the values that will work to unify all levels of government and all other "stakeholders" and agree to allow the MARK of the city is permanent, times beyond political or private interests.

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Plandetur 2015

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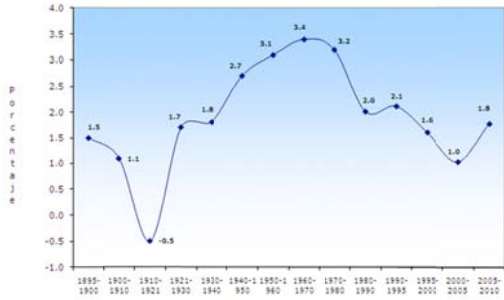
Coronado. 2008.

Zamorano. 2008.

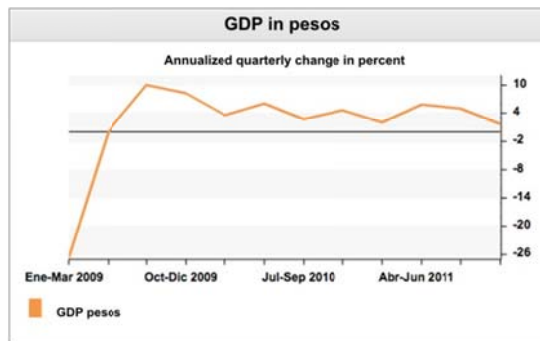
Haulot,Arthur.1991

Blanco Portillos. 2008

Appendix 1



Appendix 2



Appendix 3

Comentario [EvESL25]: Colocar el título de los apéndices

