US Migration to Mexico: Numbers, Issues, and Scenarios

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Standard methodologies for determining the number of foreign-born residents living in a nation cannot be used to count the number of US citizens living in Mexico primarily because US citizens are able to move back and forth between the two countries. In this article, data shortcomings are analyzed and a case study of a small coastal community is presented. Forty-four interviews of Mexican and US residents provide insight into issues such as resource usage, assimilation, and other impacts created by a growing foreign population.

Los métodos usuales para determinar el número de residentes en un país que nacieron en el extranjero son poco útiles para saber cuántos ciudadanos originarios de Estados Unidos viven en México, esencialmente porque éstos tienen una movilidad recurrente entre ambos países. Esta dificultad se analiza usando el caso de una pequeña comunidad costera, donde se entrevistó a 44 residentes mexicanos y estadounidenses. Los resultados permiten conocer el uso de los recursos locales, los procesos de asimilación, y otros impactos derivados de la presencia creciente de pobladores extranjeros.

Key words: migration, tourism, Baja California peninsula, US-Mexico relations, foreign born population, expatriate retirees, resource curse, Mulegé, water scarcity, COTAS.

Palabras clave: migración, turismo, Península de Baja California, relaciones México-EEUU, residentes nacidos en el extranjero, jubilados expatriados, maldición de los recursos, Mulegé, escasez de agua, COTAS.

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Introduction

Migration research in the United States reflects the fact that the country receives more international migrants than other countries and that a majority of immigrants come from Mexico (Migration Policy Institute, 2007).[1] United States and Mexican policies, the demography and economics of Mexican immigrants, their impact on sending and receiving communities, and Mexican-US migration within a developmental context are areas of active research. Secondary US literature on immigrants from other sending areas, such as Central and South America, the Middle East, South and East Asia, and Africa also exists, but the primary focus on Mexican migrants is easy to understand given the absolute and relative sizes of the flow.[2]

The migration literature in general has been constructed around models that ascribe migration to a series of push, pull, and social network factors, and later analyzed in terms of the construction of transnational identities and communities. Economists, sociologists, anthropologists, and other social scientists debate the degree to which these factors should be framed in terms of individuals, families, or communities, and whether purely monetary relations can adequately explain migration choices, but the main outlines of the standard models make explaining migration from poorer places to richer ones relatively simple. Migration in the other direction, from richer regions to poorer ones, is another matter, however. In the United States, migration research has yet to examine the phenomena of the outward movement of US nationals to developing countries such as Mexico, where geographical proximity and increasing economic integration have created unique patterns of transborder mobility.

In hindsight, it should have been obvious that increasing economic integration between the United States and Mexico, aging baby boomers, and inadequate savings for retirement would converge toward an increase in the number of US citizens moving to Mexico. Nevertheless,

1. Based on American Community Survey data for 2006, the Migration Policy Institute reports that 37,547,789 US residents were foreign born, equivalent to 12.5 percent of the US population. Of that total, 11,541,404 (30.7 percent) were from Mexico. The second highest total was for China, with 1,906,341 persons (5.1 percent). The Philippines sent the third largest group, with 1,638,413 (4.4 percent) (Migration Policy Institute 2009).

2. A brief preview of the 175 Working Papers available online at the Center for Comparative Immigration Studies (CCIS) illustrates this point. CCIS is a leading US-based migration research center. An overwhelming majority of the papers reference Mexican migrants and their communities, US policy toward Mexican migrants, Mexican policy, or some combination of all of these. Other topics are important, but there is no other outstanding focus. See http://ccis.ucsd.edu/PUBLICATIONS/working_papers.htm (accessed February 25, 2009).

more than fifteen years after the implementation of the NAFTA, and at the cusp of baby boomer retirement, this movement remains unexplored territory for academics and policy makers. A few researchers have focused on US retirees moving to Mexico, often from the perspective of gerontology and aging studies (Kiy and McEnany 2010; Sunil et al. 2007; Migration Policy Institute 2006; Truly 2002; Warner and Jahnke 2001; Young Otero 1997), but little is known about the full range of US citizens living in Mexico, including both part-time and full-time residents.

The movement of US citizens into Mexico is important for both countries and does not lend itself to the same set of issues and concerns engaging the attention of researchers looking at Mexican migration to the United States. Clearly, the issues of immigration and emigration overlap. For example, the development of transnationalism, integration into a receiving country's social networks and cultural patterns, impact on public service usage, and the legal status of residents are parallel issues for Mexicans in the United States and for US citizens in Mexico. Nevertheless, anecdotal evidence and simple observation indicate that US citizens in Mexico are very different from Mexicans in the United States across a number of dimensions, including economic and demographic characteristics, reasons for leaving the United States, and their impact on their receiving communities. These differences pose a range of potentially new questions for policy makers, both in the United States and in Mexico.

In this paper, we raise a number of issues relevant to Mexican communities and to the immigrants themselves. We describe the current state of migration research on US citizens in Mexico, highlight the inadequacy of conventional methods for measuring their numbers, and discuss the impact of US migration on Mexican society. We begin with a question for which we have no definitive answer: How many US immigrants are there in Mexico? In exploring this question, we show why conventional methods of measurement are inadequate and explain why an accurate count requires new concepts that pay much closer attention to the range of experiences of US citizens in Mexico, from short visits to extended stays and permanent residency. We then look at the characteristics of US immigrants in Mexico, with particular attention paid to those immigrants aged fifty-five and older and those immigrants born to Mexican parents. Finally, we address the question of whether US immigrants have a positive or negative impact on Mexican communities.

Our discussion is relevant to the entire range of migration patterns for US citizens in Mexico, but we also recognize that their impact on receiving communities are place-specific. The dimensions of variation include proximity to the United States, characteristics of property ownership, and the physical geography of the receiving community, among others. Consequently, we present a short case study of a specific place,

the community of Mulegé in the state of Baja California Sur on the Baja California peninsula.[3] We conclude with three possible scenarios for the town's future in the context of US southward migration.

We neither offer an ethnography of US citizens in Mulegé nor a database of foreign residents and their characteristics. Even if that were possible, we have no reason to believe that Mulegé or any other place is representative of the entire range of US citizens, their circumstances, and their impact on receiving communities. In Baja California Sur, for example, water availability is a major constraint, whereas in other traditional immigrant receiving communities, such as San Miguel de Allende in Guanajuato or Lake Chapala in Jalisco, water does not have the same effect since the climate is less arid. Nevertheless, Mulegé illustrates many of the issues raised by US migration to Mexico.

Study Area

The Baja California peninsula's easy access, beautiful beaches, desert oases, and rugged mountains have attracted a large number of US citizens to a range of settlements with very different characteristics. Some US emigrants live in communities that are close to the border whereas others are much farther away, in places that take time to reach. Foreigners on the peninsula have settled in grand-scale tourist developments such as Cabo San Lucas and San Jose del Cabo, in condominium towers and single family units near the border in the sprawling suburbs of metropolitan Tijuana and Playas de Rosarito, and in relatively small projects and single family homes in small and medium-sized communities such as Cabo Pulmo, Mulegé, and Santo Tomas. As a result of the peninsula's size and urban and geographical diversity, US nationals present a wide range of issues as they move into that part of Mexico. Baja California Sur, in particular, offers a clearer picture of this migration's impact because its population base is limited and it has very little industry, both of which make the effects of US migration more visible as immigrants are not easily absorbed into the local economy and conflated with other effects.[4]

3. The peninsula of Baja California is divided into two states: the eponymous Baja California in the north, and Baja California Sur that covers the southern 60 percent. Both are major recipients of US migrants and tourists.

4. Baja California Sur (BCS) had 512,170 residents in 2005 and is the least populated state in Mexico. It is also the least densely populated of all Mexican states, with a ratio of 6 persons per square kilometer. The next least densely populated state is Sonora, which has 12 people per km sq., or double the density of BCS. The average for all Mexico is 50 (INEGI 2003 and 2006).

Data and Methods

Our data for this study are collected from a variety of sources, including the US Department of State, Mexico's Instituto Nacional de Estadística, Geografía e Informática (INEGI), and the Consejo Nacional de Población (CONAPO). In addition, we performed twenty-five formal interviews with Mexican citizens and nineteen with US citizens residing in Mulegé and had numerous conversations with both US and Mexican citizens residing in the Baja California peninsula.

How Many US Migrants in Mexico?

Data on US citizens residing in Mexico are incomplete and of unknown accuracy. We do not know if the estimates that exist are overestimates or underestimates, and although most researchers acknowledge a high degree of uncertainty about the numbers, their research methods require them to adopt and defend a particular set that they believe to be closer to the actual number (US Department of State 2008; Migration Policy Institute 2006; Bratsberg and Terrell 1996; Warren and Kraly 1985).[5] Qualitative research on US citizens seems to focus exclusively on people of retirement age and living in a particular locale and thereby avoids quantitative assessment altogether. Table 1 provides some of the relevant estimates.

Two sources of information are available for estimating the size of the US population living in Mexico: Mexico's CONAPO, which derives its estimates from census and population count data compiled by INEGI, and the US Department of State. The former is a serious effort at a complete head count of the foreign born, whereas the latter is a less systematic effort based on records of people who register with the embassy in Mexico City or with one of the twelve American consulates spread throughout the country. Prior to 2000, the Department of State issued estimates for the purpose of planning emergency evacuations, but today the estimates are part of the general information provided in its *Background Notes* publication.

The Department of State does not claim to provide an accurate count and, as shown in Table 1, its estimates are quite a bit larger than CONAPO's. Department of State estimates have been criticized by the Migration Policy Institute (2006) for not deregistering citizens after they leave the country and for possibly including short-term visitors. The size

5. The most recent study, that of the Migration Policy Institute (2006, 23), concludes "Despite the growing importance of US retirement abroad, data about the numbers of US citizens abroad, much less numbers of retirees, their settlement locations, or their effects on and interactions with local communities, are meager and incomplete."

Table 1: US citizens living in Mexico

Source	Data source	Year	Total	Retirees
Bratsberg and Terrell	US Department of State Emergency Evacuation Reports	1996	522,274	NA
CONAPO	Mexican census and population counts	2000	343,591*	23,854*
Migration Policy Institute	Integrated Public Use Micro-Sample (IPUMS), derived from Mexican census	2000	358,614*	28,247*
US Department of State (1)	Consulate registrations	1999	1,036,300	NA
US Department of State (2)	Consulate registrations as reported in *Background Notes*	2008	500,000 to 1,000,000	NA

*CONAPO does not report US citizens per se; rather it reports Mexican residents who were born in the US. As discussed in the text, this is a further complication.

of either bias is not determined. On the other hand, the Migration Policy Institute (MPI) and CONAPO data may omit many people who intentionally avoid being counted, people who are seasonal residents and not in Mexico when the census occurs, and people who travel back and forth without spending six months in one place.

Within the Baja California peninsula, the data are even less reliable. The US consulate in Tijuana describes the situation in the following terms:

> They come; they go; and they seldom advise us of either movement, as much as we encourage them to register with us. Our very general guess of how many American citizens live in Baja California is between 75,000 and 100,000. When seasonal and tourist travelers are added in, the number swells to the vicinity of 200,000. (Public Information Officer, US Consulate, Tijuana; personal communication, March 2009.)

Mexican census data shows 56,033 people resident in Baja California in 2000 who were born in the United States (INEGI, 2003) and only 2,182 in Baja California Sur during the same year.[6]

Too Many or Too Few?

Both methodological and definitional problems arise in measuring the number of US immigrants in Mexico. Methodologically, the two most common ways to measure the stock of foreign residents in a country are with population registers, such as a census, or with residence permit data (OECD 2009). Census data, such as that provided by INEGI, record the birthplace of residents and are frequently used to estimate the number of first-generation immigrants. In the census count, some criteria must be used to determine residency. Short-term visitors or people we think of as tourists are not residents, but other cases are less clear-cut, in which case a length-of-stay criterion is used to classify people into resident and nonresident categories. In Mexico's case, the cutoff is an intended or actual stay of six months or more. According to the OECD, a majority of countries use between three months and one year (2009).

Definitional problems overlap with the methodological problem. The International Labor Office (Bilsborrow, et al. 1997) and Parsons, et al. (2007) discuss the definition of migrants by place of origin and nationality. The most common definition of a migrant uses the foreign-born criterion where migrants are counted based on their country of

6. The six border states account for 49 percent of the US born residents in Mexico; also important are traditional migrant sending states, including Jalisco, Michoacán, and Guanajuato.

origin.[7] A second criterion defines migrants as having foreign nationality, which is based on citizenship (UN 2009; Parsons et al. 2007). Harrison, et. al., find that a high correlation exists between foreign-born and foreign-national populations (2003), but this is questionable for the case of US migrants in Mexico given the large number of US-born Mexican nationals younger than fifteen. Parsons, et al. confirm that large disparities can exist between the two populations (2007).

Problems with using Mexican census data to measure the number of US citizens are evident in the age structure of the migrant population. In all likelihood, many individuals classified as foreign born are Mexican citizens born in the United States. Data from the census shows that 68.5 percent of the category of "Mexican residents, born in the US" are younger than fifteen, whereas only 7 percent are fifty-five or older. The latter category (fifty-five and older) is the one used by most studies of US retirees (Sunil, et. al. 2007; MPI 2006; Truly 2002; Young Otero 1997; Stokes 1990). Consequently, if the INEGI/CONAPO data are correct, then most researchers have focused on a very small percentage of the total immigrant population. In fact, the INEGI/CONAPO data are probably a result of the fact that many children are born to Mexican parents temporarily resident in the United States. Constitutionally, a child born to Mexican parents is a Mexican citizen, regardless of his or her place of birth, but the parents must register the child, either in Mexico or through a Mexican consulate or embassy if they are abroad. If the family lives in Mexico at the time of the census, and if the parents have not registered their child, then he or she is not officially recognized as a Mexican citizen and the census would correctly record them as a foreign-born person living in Mexico. The fact that almost one-half (49.2 percent) of US-born residents of Mexico live in the border states, where access to US hospitals is somewhat easier, is consistent with that fact.[8]

The potentially high number of foreign-born Mexican nationals who are counted as US migrants in Mexico bias the INEGI/CONAPO upward if used to estimate US migration. Nevertheless, there are biases in the

7. In the United Nations database, 78 percent of the countries define international migrants using the foreign-born criteria (2009).

8. If the population younger than fifteen is omitted based on the assumption that they are children who are culturally Mexican but holding US citizenship due to their place of birth, then the INEGI/CONAPO data only record 108,231 US-born residents of Mexico. Given that the US Consulate in Tijuana believes that the state of Baja California has by itself between 75,000 and 100,000 US citizens in residence, there is a greater than recognized discrepancy between the data sources. The discrepancy becomes inconsequential, however, if one recognizes that the Consulate's number is a crude estimate and INEGI/CONAPO data measures something different than the meaning researchers have assigned to it.

opposite direction. First, some US citizens do not want to be counted. Stokes (1990) and Truly (2002) both note that some retirees have no interest in being contacted and refused to participate in their study. Truly hypothesizes these people are reclusive personalities, whereas Stokes argues that they systematically avoid contact with Mexican officials since US residents often do not speak Spanish and are, therefore, of lower status in their interactions. There are other reasons for not wanting to be contacted, however, ranging from illegal land purchases, living in Mexico without proper authorization, or working without a visa, to name a few. Two other reasons for a bias toward an undercount are that US migrants may be absent when the census occurs, or even more problematic, they may not be categorized as Mexican residents by INEGI. The latter point bears explanation.

Tourists or Migrants?

Like all census takers, INEGI must determine where people should be counted. Tourists and temporary visitors should not be counted in the place they temporarily occupy if they plan to return home in a reasonable time period. INEGI uses a six-month rule so that anyone not staying for six months or more in the place where they reside when the census occurs, is counted as residing in their place of origin. For domestic Mexican migrants, this means that someone in, say, Tijuana, for less than six months, and with no plans to stay beyond the six-month period is counted as a resident in their state and community of origin. US citizens will not be counted as residents in Mexico unless they have been in their place of residence for six months or have plans to stay at least that long without returning to the United States. If US citizens maintain a house in the United States, and if they return two or three times a year, they are unlikely to reach the six-month criterion and it is unlikely they will be counted as residents in Mexico. These circumstances highlight the difficulty of differentiating some categories of tourists from migrants (Rodriguez 2001) and explain, in part, why the phenomenon of US citizens moving to Mexico has largely escaped the attention of migration researchers.

The United Nations recommends a set of definitions for international migrants, distinguishing between short-term and long-term migrants and international visitors (1998). An important term is "country of usual residence," defined as "the country in which a person lives, that is to say, the country in which he/she has a place to live where he/she normally spends the daily period of rest" (UN 1998, 18). They define a long-term migrant "as a person who moves to a country other than his/her usual residence for a period of at least 12 months" while a short-term migrant

is "a person who moves to a country other than his/her usual residence for a period of at least 3 months but less than 12 months," and does not include mobility for purposes of recreation, holidays, visits to friends and relatives, business, medical treatment, or religious pilgrimage when the visitor's country of usual residence does not change (18). International visitors are defined as "any person who travels to a country other than that in which he/she has his/her usual residence but outside his/her usual environment for a period not exceeding 12 months" (United Nations and World Tourism Organization 1994, in UN 1998, 17).

The length of stay in Mexico is one of the most important variations in the experiences of US citizens and is a characteristic that differentiates their movement from more classical forms of migration. The proximity of many Mexican communities to large population centers in the United States creates a more fluid coming and going. For example, the owner of a house or apartment in Playas de Rosarito, Baja California, located just thirty minutes from the border, may live permanently in metropolitan San Diego, Orange County, or even Los Angeles, and make frequent weekend and holiday trips. Given their property interest, they must also have a permanent concern with the community's well-being in their part-time Mexican place of residence. A tourist, however, can leave and never come back. This type of ongoing relationship with a Mexican community does not fit into any of the UN definitions just given. On the one hand, they are international visitors, but their property interest and relationship with a particular community over a period of many years and even decades make them more like long-term migrants.

The geographical proximity of Mexico and the United States, together with the relatively higher incomes of many (but not all) US citizens in Mexico, allow for a much more fluid population than traditional migrants. Lengths of stay range from a few days at a time to a few months to most of the year to permanent. Each of these levels of engagement with a Mexican community has its own characteristics, but they share a common set of long-term interests in the place where they locate. Events in the Mexican community affect the long-term well-being of all property owners, regardless of their usual length of stay. While viewing all US seasonal or temporary residents of Mexico as migrants may be inaccurate, viewing many of them as tourists is equally erroneous. Indeed, one of the points we make later is that Mexican nationals, including policy makers, may have a difficult time separating the tourists from the residents and distinguishing the local impact of tourists from those of US expatriate residents. Many US citizens own property and place demands on local Mexican services that are similar to those of permanent residents and Mexican citizens. They hire local labor; they demand water, electricity,

and sewerage; they may put their children in schools; and they are similarly affected by public safety and the quality of their environment.

One of the key determinants of length of stay is the proximity of the Mexican residence to the border. Communities on or near the border, such as San Felipe in the *municipio* of Mexicali, or other locales in Rosarito, Ensenada, Tecate, and Tijuana, afford US residents a much easier ingress and egress. Destinations farther south require a day or more of driving or a trip to the airport and a short flight. Although many US expatriates live permanently in communities on or near the border, those locations also attract weekend and holiday visitors who use their Mexican residence as a second home.

Finally, researchers must define the population of interest. Is it only US citizens who have lived most of their lives in the United States but now reside year round in Mexico? Should it include people who live most of year in Mexico, or anyone who owns property there? If it is the latter, should we consider those who own time-share condominiums? If the purpose of the research is to understand the impact of US migrants on Mexican communities, then it seems reasonable to consider anyone who owns property and spends more than a month living in it. This definition changes the meaning of migrant, as one might be a "part-time migrant," a category that falls between tourist and those migrants who take up permanent residence in a new country.

Some Characteristics of US Migrants in Mexico

Retirees may make up the largest share (although not if the INEGI/CONAPO data are accepted; again, this is an empirical question awaiting examination), but certainly not all US citizens settling in Mexico are retired. Some have children with them, some attempt to set up income-generating activities, and some are part-time migrants. For example, the anthropologist Tamar Wilson describes a neighborhood in the municipality of Los Cabos, Baja California Sur, that is composed of mixed couples holding US and Mexican citizenship; US-origin families of Mexican ancestry in which some members have applied for and received Mexican citizenship; Anglo-Americans who come for six months with children; single females from the United States and Europe, both with and without children; and several other combinations of ethnicities, nationalities, and ages (2008). The Migration Policy Institute (2006) notes that real estate agents in San Miguel de Allende (Guanajuato) see a greater number of families and younger migrants, some of whom telecommute to jobs in the United States. In general, the portrait of migrants varies significantly from the picture given by previous qualitative studies of US

retiree communities, in which the ethnicity of the residents is primarily Anglo-American and they are mostly older than fifty-five years of age.

Labor force participation is another characteristic that seems to differentiate some communities from the more traditional ones that make up the literature on retirees. The Migration Policy Institute mentions that some retirees work in Mexico (2006) whereas Kiy and McEnany note that, in their survey, only 46 percent of the group between the ages of 50 and 65 are fully retired (2010). In addition, anecdotal evidence from our study area and our discussions with Mexicans living on the peninsula indicate that a significant but unknown share of US citizens work while in Mexico. As in any immigrant community, a variety of work is available in servicing the needs of the immigrant community itself, and migrants with particular skills also have the language and cultural characteristics desired by other immigrants. Work activities include tax accounting, massage therapy, mechanics, computer technicians, real estate, handyman, business consulting, and virtually any skilled work that one can perform on one's own (Wilson 2008; interviews with Americans in Mulegé). In the Baja California Sur town of Todos Santos, a core of long-term US residents have formed an "art colony" and own galleries, restaurants, and other enterprises oriented toward tourism.

The experiences of many US citizens in Mexico are undoubtedly different from the experiences of people who were born abroad and are returning to the "old country." In those cases, expats take up residence, either part-time or full-time, in cities and villages familiar from childhood, in countries where the language is familiar, and where they have social and familial networks. Anecdotal evidence indicates that some share of the population of US migrants is of Mexican descent, but the proportion is completely unknown. In all likelihood, the relative importance of family ties and social networks varies by place. In the twin-cities of the US-Mexico border region, for example, family ties likely play an important role given the historical movement of people and the rise of a transborder population (Anderson and Gerber 2008). Ultimately, however, this empirical question must be answered through field research because the literature on retirees shows that only a small percentage of that group speaks Spanish. This finding may, however, be due to the location of the research projects—far from the border and in traditional immigrant-receiving communities such as San Miguel de Allende or Ajijic.

US Migrants and Mexican Communities

The impact of part-time residents on local communities may be similar to those of tourists, a point recently made by Truly who compares two different models (2002). In the model proposed by Rowles and Watkins,

the impact of retiree migrants on three small Appalachian communities is examined (1993), while in Butler's model, the tourism resort cycle is analyzed (1980). In comparing the models, Truly finds a high degree of similarity, since both are versions of a product lifecycle in which the retirement community and the tourist resort pass through five stages: "exploration, involvement, development, consolidation and stagnation . . . until the destination reaches a critical mass (i.e. it exceeds its carrying capacity) and often begins to show signs of stagnation, followed by decline in popularity," (2002, 265).

Retirement communities and tourist destinations are not that far apart in another sense, since the literature on Mexico and other locales is explicit that tourism experiences are used by people getting ready to retire and considering potential retirement sites (Sunil et al. 2007; Haas and Serow 1993; McHugh 1990; Cuba 1989; Wiseman and Roseman 1979). This view extends the traditional definition of migration networks by arguing that tourist experiences are a form of social network that provides a sense of familiarity, comfort, and knowledge that is similar to the information provided by a more traditional social network.

Impacts of Tourism and Migration

A number of studies of tourism in Mexico have been negative about its effects. For example, Wilson argues that it creates greater inequality due to the gap between low-wage, unskilled, workers in the tourism sector and the owners and managers of large tourism hotels and developments (2008). Swords (2008) and Lopez, et al. (2006) make a similar point about the increased inequality generated by tourism, but instead of the widening gap between unskilled workers and skilled Mexican workers, they emphasize the gap created between service providers and foreigners. Brenner and Aguilar argue that Mexican tourism does not support or lead to development (2002), and Brenner asserts that it creates enclave economies (2005). In addition, a number of studies discuss the environmental damage that can occur as a result of rapid tourism development (Gámez 2008; Gerber 2007; Brenner 2005; Bringas-Rábago 2002). These studies overlap on one point with at least a couple of studies of retiree migration. A frequent comment by both US retirees and Mexicans living in host communities is that retirees push up prices, including real estate, and make life more expensive for Mexicans (Migration Policy Institute 2006; Truly 2006; Young Otero 1997). The issue of the costs and benefits of US migration is at least partly an empirical question, but to date, we do not have enough information to determine them.

In spite of the forgoing, that part-time and full-time migrants have the same or similar impacts on Mexican communities as do tourists is

not certain. For example, Mexican citizens in host communities have commented to researchers that US citizens provide various forms of community assistance, including volunteer work and fund raising for schools, scholarships, and other community needs (Kiy and McEnany 2010; Migration Policy Institute 2006; Bloom 2006; Mulegé interviews). Migrants employ local labor and they shop locally, two other effects that we found in our interviews with Mexican citizens in Mulegé. Whether the hosting of part-time and full-time US migrants is beneficial or not cannot be settled by theory alone. The issue is complicated by the fact that outcomes are likely to vary across time and space, depending on local Mexican institutions and on the limits created by the host community's physical geography. That is, US migrants may generate net positive effects in one area, leading to more opportunity and a better standard of living for many Mexicans, while generating net negative effects in another area where inequality is exacerbated and environmental degradation is intensified.

The Case of Mulegé, Baja California Sur

The case of Mulegé in Baja California Sur is informative, in part, because it illustrates how local Mexican institutions might either worsen or improve conditions, depending on their reactions to the challenges they face. The town of Mulegé, or technically, Heroica Mulegé,[9] is located about 2 kilometers inland from the Sea of Cortez, in northeastern Baja California Sur, in the municipality of Mulegé. The population of the town of Mulegé was listed as 3,434 in 2000 (INEGI 2003) and included 182 foreign-born residents, of which 159 were US born, according to the census.[10] As with other locales occupied by US migrants, the actual number is probably much larger if part-time migrants are included, although we cannot cite specific numbers with confidence. Residents frequently stated during interviews that the population likely reached 5,000 during the tourist winter months. That would imply approximately 1,500 foreigners, including Europeans, Canadians, and some tourists.

The population of Mulegé has remained relatively stable over the past few decades, in contrast with other parts of the state such as Los

9. Heroica Mulegé is the locale (*localidad*) commonly referred to as Mulegé. Heroica Mulegé is located in the municipio of Mulegé, which includes almost one-half of the territory of BCS and several other towns, such as Guerrero Negro and Santa Rosalía. In this paper and in our research, we interviewed people in Heroica Mulegé, which we, and its residents, call Mulegé.

10. Earlier caveats about the INEGI/CONAPO data are relevant when weighing the relative importance of these numbers.

Cabos.[11] There are limited employment opportunities for local residents, the majority of whom work in agriculture, tourism, retail, or some combination of these. The climate of Mulegé is arid and its limited water resources are consumed primarily by agriculture (Topmiller 2008). Nevertheless, the region has great scenic value as it contains one of the only river oases in Baja California Sur, the second mission to be built in the Californias, and the pristine and largely undeveloped Bay of Concepción just south of town.[12] Each of the primary economic activities (agriculture, cattle ranching, and tourism) depends on water. As an essential commodity in a desert oasis, the administration and usage of water will be a primary factor in Mulegé's future.

Water Administration and Use in Mulegé

The National Water Law (1994) of Mexico states that the National Water Commission (Comisión Nacional de Agua, or CONAGUA) must grant every water user a concession, published in a national registry, and every watershed must have a user list that is published by CONAGUA (Asad et al. 2006). According to the national registry (Registro Público de Derechos de Agua, or REPDA), CONAGUA grants the oasis community of Mulegé a total concession of 4.5 million cubic meters of water per year, which is distributed among 60 users, each of whom has a well. The total concession is roughly one million cubic meters of water less than the estimated average natural recharge of the aquifer (CONAGUA 2001). Water use is dominated by the agricultural sector, which controls almost 90 percent of the total amount granted in the watershed. The urban sector is allowed 11 percent of the total; this includes water use in households, businesses, hotels, and water purification. The cattle ranchers, primarily located in isolated localities to the west of town, are allowed less than 1 percent of the concession (CONAGUA 2001 and 2004). In 2001, CONAGUA estimated that the level of subsurface water in the watershed had fallen significantly in the last few decades due to the drilling of deep wells and unregulated use in the agricultural sector.

The watershed of Mulegé began to be regulated more carefully in 2001 with the creation of a mandated Technical Council for Subterranean Water (Consejo Técnico de Agua Subterranea or COTAS). COTAS is made up of representatives of all water users and is responsible for ensuring

11. The 2005 population count in Mulegé actually shows a decline in total population from the 2000 count, from 3434 to 3317, a loss of 117 residents. The count does not report the number of foreign born (INEGI 2006).

12. The Centro de Investigaciones Biológicas Noreste (CIBNOR), located in La Paz, BCS, has identified 171 oases in the estate. Mulegé contains one of the largest and is one of the only ones with year-round running water (Arriaga and Rodríguez-Estrella 1997).

that the watershed is not overexploited. Agricultural producers, particularly the Ejido 20 de Noviembre,[13] which dominates the watershed around Mulegé and is the largest consumer of water, are aware of the issues concerning the scarcity of water in the region and have made changes to increase the efficiency of their water use, such as switching toward higher value-added crops produced for the export market and away from lower value, water-intensive crops such as corn, wheat, and sorghum, which were produced for domestic consumption. Ejidatarios have also begun to use greenhouses to protect crops from adverse weather conditions, to limit evaporation of water from the soil, and to provide catchments for rainwater. One group has used greenhouses to produce organic crops for the past decade, and a second group recently completed the construction of another greenhouse (Topmiller 2008).

Mulegé as a Destination for Foreigners

Mulegé is situated just off the Transpeninsular Highway about an hour and a half drive south of Santa Rosalía, where a ferry connects the peninsula with mainland Mexico, and two hours north of the larger tourist destination of Loreto. To the west of the highway is the Mission of Santa Rosalía de Mulegé, situated above the Mulegé river, with spectacular views of the extensive palm grove below, the valley and mountains to the west, and the town to the east. The town center itself is to the east of the highway, on the north bank of the river. Due to its susceptibility to flooding, the southern bank of the river was largely uninhabited until the influx of foreign residents. The town is connected to the highway by a strip of several blocks that leads to a series of narrow one-way streets. The town has no precise center, though there is a town square, but the Catholic Church is several blocks away in one direction and government offices several blocks in the other direction.

The town has four moderately priced hotels in the center, which together provide about seventy air-conditioned rooms. None of these hotels is new and none is part of a national or international chain. The more expensive Hotel Serenidad is near the beach just south of the town and includes its own airstrip. Three RV facilities are available, along with some smaller guest houses. The town center has three or four restaurants in addition to hotel restaurants and a number of well-regarded taco stands; another restaurant is located at the beach. A few tourist shops

13. Ejidos are communal agricultural landholdings in which members have use rights but not disposal rights. The constitutional reforms of 1992 made it possible for ejidos to divide their land into fee simple lots, but the Ejido 20 de Noviembre has so far not selected that route. The Ejido currently has almost 12,000 hectares and 87 members (CONAGUA 2001 and 2004).

offer ceramics and other handicrafts, clothing, and souvenirs. There is one middle-sized supermarket facing the town square and three or four smaller ones, one of which caters to the expatriate population. Until recently, Mulegé had no banking or ATM services.

Tourist and expatriate resident activities are centered on the Sea of Cortez. Fishing, kayaking, diving, and snorkeling are all available. The coast at Mulegé lacks a sandy beach and is connected to the town by an unpaved and poorly marked road. However, spectacular beaches are found at Bahia Concepción starting about twenty-five kilometers (fifteen miles) south of Mulegé and at the somewhat less accessible Punta Chivato, about fifty kilometers (thirty miles) to the northeast of the town. Trips to ancient cave paintings and ranches in the Sierra de Guadalupe to the west of the town can be arranged. Mulegé is not a destination for tourists interested in American-style fast food, US chain hotels, or extensive nightlife.

Mulegé has not experienced a tourist boom in recent decades, though the number of foreign residents has continued to grow. Residents say that tourism in Mulegé has not grown in part because of its pleasant but less than ideal climate, a little too cool in the winter and a little too warm and humid in the summer, in comparison with Loreto and other destinations farther south. The town's size and relative remoteness have also played a role in the stagnation in tourist facilities and services. On the other hand, Mulegé has retained its charm as an "authentic" Mexican town whose scale appeals to some tourists.

For foreign residents, living in Mulegé is a commitment in terms of travel and relative lack of services. The town is a two-day drive from the international border at Tijuana/San Diego. The nearest hospital and migration services are at Santa Rosalía more than an hour away. Serious medical cases require transport to Ciudad Constitución or, more likely, La Paz, at least six hours by car. The nearest commercial airport is two hours away at Loreto, with much less frequent service than at La Paz and Los Cabos, which are farther south. The lack of advanced health services in Mulegé means that many US retirees will be limited in the years they are able to spend there. As health problems become more acute with advanced age, retirees may need to leave Mulegé and return to the United States or find another expatriate community with more health services.

Foreign Residents

US residents began to arrive in Mulegé in the 1980s. Today, a majority are seasonal (October to May) and are located in several distinct communities within the geographical area of Heroica Mulegé. Based on our interviews, the North American community cannot be classified as a homogenous group, but can be divided into three categories along a spec-

trum, based on willingness and ability to speak Spanish, desire to interact with the Mexican community, and overall integration with the local population.[14] This division is consistent with the international retirement migration literature (Bloom 2006), including the observation that the majority of foreign residents do not speak Spanish yet express some willingness to engage with the community, particularly on projects intended to benefit Mulegé.

Residents in the most integrated category live in a mixed community of Mexicans and foreigners located just outside of the town center on higher ground near the coast. The foreigners in this community are generally full-time residents. Members of this group live closer to town than members of the other two groups and are relatively well integrated. They tend to speak Spanish, at least somewhat, and are active in the community. A few members of this group live with Mexicans and some are married to Mexican citizens. Not surprisingly, members of this group seem genuinely concerned about the future of Mulegé and the welfare of the community.

The semi-integrated category consists of foreigners who are generally part-time residents. This group interacts with the local Mexican community primarily in a service context (for example, hiring labor) and speaks little or no Spanish although they are often willing to try. The members of this group generally have a positive impression of the Mexican community. The men are attracted to Mulegé by its fishing, and a few of them belong to the local Rotary Club, which is one of the primary vehicles for US-Mexican philanthropy in the community.

The third category is the least integrated and tends to live on the opposite side of the river from the other two groups and the town center. Like the second group, they are primarily part-time residents, though a few are full-time residents as well. Members of this group do not interact with the local Mexican community outside of a service context and have little or no interest in speaking Spanish or becoming part of the community.

These categories are not mutually exclusive and many individuals and households are difficult to place in one group more than another. The semi-integrated and least integrated categories have a good deal of overlap, and the limits of our interview sample prevent us from being able to clearly delineate all three groups. Nevertheless, the main outline of the characteristics of each group is consistent with much that has been written about US retirees in Jalisco, Guanajuato, and other locales (Migration Policy Institute 2006; Truly 2006).

14. Note that the non-Mexican population is primarily US citizens, but includes Canadians and a few Europeans as well.

Very little has been written about Mexican views of foreign residents, so we cannot say if the views of Mulegiños are similar to those in other parts of Mexico. Our respondents were generally very positive about the foreigners living in their community, at least in interviews with us.[15] They were especially positive about and frequently mentioned the charity events and fundraisers performed by the local Rotary Club (which has mostly US and Canadian members) and the Lions Club (which has a more mixed membership). Many of the Mexican respondents commented on their friendships and the good relations they have with the foreign residents.

Much remains to be learned about the building of relationships among the US expatriate residents and between them and Mexican residents. Although a small number of US residents live in Mulegé all year, the summer months contrast sharply with the winter months in terms of numbers and activities. By June or July, most foreign residents have left, either for residences they maintain in the United States or to visit family and friends. In addition to their national origin and culture, US residents share many interests, from issues that arise with housing and migration status, to transporting mail and goods from the United States. Activities in the town include individual volunteering (for example, at health clinics) and the fundraisers mentioned previously. For some US residents, contacts with Mexicans occur almost entirely in the context of service relations; others have social friendships of several decades' duration.

The expatriates engage in transnational community building as they interact with each other and with kin and friends in the United States. E-mails and various "Baja" blog forums make maintaining contact with fellow Mulegé residents, even when away from the town, possible. These links—and a sense of community identity—were strengthened in the aftermath of a hurricane and floods in 2006 and a tropical storm in 2008. Damage to the town had relatively greater affects on both poorer Mexican residents who lived on the flood plain to the west of the highway and on the expatriate residents living along the south bank of the Mulegé river (the town center was much less affected, as Mulegiños have known for centuries to stay away from the south side of the river).

According to our interviews, the hurricane and flood pulled the expatriates closer together as a community within Mulegé. Expatriates whose homes were damaged by the flood expressed sympathy for the Mexicans who shared their fate, but their primary interactions were

15. In order to avoid embarrassment and to allow Mexican respondents to answer more freely, we used Mexican students from the Universidad Autónoma de Baja California Sur to conduct approximately one-half of our interviews with Mexican citizens.

within the expatriate community. Their sense of community appears to have been strengthened as people learned about the fate of their houses from neighbors and shared their condolences with fellow expatriates who had lost their furniture and even their houses. More important from the point of view of Mexicans in Mulegé was the competition with foreign residents for construction materials and labor during the recovery from the two floods. Both Mexican and US interviewees commented that costs for both had increased greatly, with the foreigners far more able to absorb the inflation.

Business opportunities for foreign residents are few. The expatriate community is not large enough to support services by US residents, and the tourist sector can support only a small number of services such as kayaking or diving that foreigners tend to manage. Just as the lack of medical services limits the ability of US residents to live out their lives in Mulegé, so at the other end of the age spectrum, the lack of economic opportunities and educational services in Mulegé prevent younger US citizens with children from settling in the town.

Based on our interviews, we conclude that it is unlikely that many US residents will develop a sense of transnational identity. The partial exception are the few who are thoroughly integrated (such as through marriage) into the local community. One reason for this is the lack of children born of US parents but growing up in Mexico, as can be found in some families in Los Cabos and Todos Santos.

Water, Development and US Migration: Three Scenarios

The potential to attract US migrants in significant numbers is a valuable resource for local residents of Mulegé. The direct gains from exploiting this resource are not likely to be shared equally, however, since access to land and water is not equally distributed. As a result, housing development for US expatriates may generate conditions similar to those in the tourism sector, which have been criticized by a number of observers. The potential gains that would come from exploiting Mulegé's attractions are conceptually similar to a natural resource boom, where a sudden discovery of mineral deposits, or the ability to produce a relatively rare and highly sought after crop (e.g., in Latin American history, rubber, cochineal, sugar), leads to a sudden surge of economic activity, the accumulation of wealth by those able to control the exploitation of the resource, and the drawing in of many additional resources, both human and financial, that are attracted to the potential gains. In Mulegé, as in other locales in Mexico, individuals who are close to the land resources in attractive locations have great incentives to make the land suitable for US migrants or to sell it to others with the resources to build. The cur-

rent global financial crisis has undoubtedly reduced the potential value of land development, but within a few years, development seems likely to return as the inexorable retirement of baby boomers moves forward and US migrants continue to look toward Mexico.

In the case of Mulegé, we can describe three distinct scenarios as limiting cases. Each scenario is possible in the future, but with an uncertain probability of occurrence, and because these scenarios are not altogether mutually exclusive, some combination of all three might be the most likely.

The first scenario, and the least informative, is a continuation of the status quo: Mulegé is largely bypassed as migrants aim farther south toward Loreto, La Paz, Todos Santos, Los Cabos, or any of a number of other communities, including several fenced enclaves on the shores of the Sea of Cortez. The population of the community does not grow much beyond its present size, young Mulegiños leave for places with more attractive opportunities, and the pressures on the town's water stay near the status quo.

In the second scenario, the Mulegé region becomes the next target of large-scale housing development along the Baja California coast. Water exploitation sharply increases to supply the households of foreign residents and to irrigate the landscaping in new developments. As services for foreigners in Mulegé increase, a boom in retiree migration occurs, primarily toward the beach sites, but affecting the town as well. While the developments at the beaches are entirely owned by outside interests, within the town, residents sell their land to speculators. The town's economy becomes even less diversified as employment opportunities arise overwhelmingly in the tourist/foreign-resident sectors. Wages are kept to the minimum, and most of the profits are exported from the region.

The second scenario is consistent with an economic model of the resource curse (Collier 2007; Easterly 2006) and could result from the wave of developments that have as their main objective the construction and sale of real estate to US baby boomers and other migrants from high-income countries. The resource curse hypothesizes that resources can be a curse, rather than a source of wealth, when they create powerful possibilities for enrichment by drawing in a disproportionate share of labor and capital and by causing all economic activities to become oriented toward their exploitation. Activities that directly support social and economic development become secondary to the goal of exploiting the valuable resource, and issues of long-term sustainability are neglected because the primary focus is on the immediate enrichment of interests that control commercial access to the resource. Furthermore, in the context of a weak set of political and civil institutions, corruption

can flourish as competing interests vie to control the resource through both legal and extra-legal means. The resource economy is best described as an enclave where, in addition to minimal direct positive effects for economic and social development, the lack of linkages between resource exploitation and the surrounding economy results in few or no indirect effects as well. To oversimplify a bit, in this hypothetical scenario, one can think of the construction of condominiums or houses for US expatriates as a modern form of a traditional Latin American mineral economy, where resource exploitation takes precedence over all else, and there are few positive and many negative effects on the surrounding communities (Gámez 2008; Bringas-Rábago 2002)

This point was strikingly illustrated by a common theme in the interviews. Many interviewees expressed the opinion that the construction of a tourist walkway along the river would be the best use of federal funds for reconstruction after the hurricanes. In the meantime, the repair and upgrading of the municipal water treatment plant, as advocated by other local residents, remained unaddressed. Part of the flood control effort after Hurricane John in 2006 was the widening of the Mulegé river channel, which entailed the destruction of mangroves. US residents to the south of the river approved of the removal of the mangroves, as it improved their view, and Mulegiños who wished to see a redevelopment of the town center, which they remembered from their youth, also approved of their removal. The federal government intervened, however, and put a stop to the mangrove destruction on environmental grounds. In both the issue of the river walkway and the elimination of mangroves, ideas about financial gain from exploiting the river resource dominated the thinking about the long-term future of the community.

A third scenario is much more positive. In this hypothetical, the local ejido, 20 de Noviembre, continues to dominate water extraction and use and acts as a break on unsustainable real estate development. At the same time, the ejido's evolution toward production of nontraditional crops for the export market generates a growth in income that provides an economic incentive to maintain local control over land and water. In effect, the ejido provides a deeply rooted institutional structure, along with a clear economic incentive, for opposing short-term, unsustainable real estate development.

With the flow of visitors kept in balance by the agricultural interests of the ejido, tourism in Mulegé is further developed on a moderate scale and under local control. The town's numerous attractions, including the mission, the little visited museum that overlooks the town center, the picturesque lighthouse overlooking the Sea of Cortez coast, and the oasis with its palm grove are promoted, along with the more obvious water-based activities. Visits to ancient cave paintings and working

ranches in the area are facilitated with Mulegé as a point of departure. These activities are sustained at a level that provides local income but does not attract the attention of large-scale investors. The third scenario would maintain a balance of economic activities and protect the town from the vagaries of tourist booms and busts. Even more importantly, a measure of control over the productive capacity of the town would be kept in local hands.

The first two scenarios outlined point toward either stagnation or, in the second scenario, decline. Both seem possible from a purely economic perspective, but neither case considers the relevant institutional environment of the community of Mulegé, where a relatively strong and increasingly prosperous collective agricultural enterprise offers an alternative to real estate development.

Conclusions

The southward movement of US citizens to Mexico is significant in terms of their impact on specific communities and the nation as a whole. The study of American residents in Mexico is of interest to policy makers and social scientists on both sides of the border. On the US side, for example, outward migration of senior citizens may lead to a reexamination of Medicare rules that exclude reimbursement for care outside of the US, even if it is less expensive. On the Mexican side, the impact of foreign migration on the cost of housing and services for Mexican residents can be acute.

The difficulties of understanding the diverse communities of US citizens in Mexico are compounded by a lack of basic data. Fundamental to an understanding of their movement is the need to determine classification categories in terms of length of stay and shared interests with the host community and the relationship of these factors to the costs and benefits of their presence in Mexico. In this regard, we have sought mostly to raise questions rather than to answer them.

We also have reported on some preliminary findings from Mulegé, one of the lesser-known but well-established communities of US citizens in Mexico. We have contrasted two possible scenarios of economic development in Mulegé. In one, the elements of a resource boom become manifest in the form of a land rush. Those who benefit from the turnover of land in speculative markets make quick profits without needing to consider the impact on the region. The longer term characteristics of this scenario resemble the "resource curse," whereby the productive forces of the community are focused on tourism and serving a large expatriate population to the detriment of a more diversified economy and the sustainability of water resources. Economic development is driven

by outside institutions and locals exert little influence over the direction of their economy. In the contrasting scenario, local institutions take the lead, particularly with regard to control of water, and continue the trend toward a more diversified economy in which the expatriate community, tourism, and increasingly sophisticated agriculture production all have their place.

The concerns discussed in this paper are sure to become more pressing as baby-boomers retire and stream southward. Without a clear picture of the characteristics and number of expatriates in Mexico, examining the costs and benefits of this migration will be difficult. Beyond demographic data, surveys and ethnographic data of the diverse expatriate populations in Mexico are needed. US researchers, with their language skills and cultural identity, are especially well equipped to provide this service.

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