Comparative study of the foreign communities of Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala

Marco Antonio Cortés Guardado

Cecilia Soraya Shibya Soto

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Universidad de Guadalajara



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Humanidades

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2026

Esta publicación fue dictaminada favorablemente mediante el método doble ciego por pares académicos. "Distribución gratuita prohibida su venta".

304.87307235
COR
Cortés Guardado, Marco Antonio.
Comparative study of the foreign communities of Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala/ Marco Antonio Cortés Guardado, Cecilia Soraya Shibya Soto, Michael Nolen.

Primera edición, 2026.
Zapopan, Jalisco: Universidad de Guadalajara, Centro Universitario de Ciencias Sociales y Humanidades, Unidad de Apoyo Editorial, 2026.

ISBN 978-607-646-070-2

1. Lugares de retiro - Ajijic, Jalisco.
2. Lugares de retiro - Puerto Vallarta.
3. Lugares de retiro - Chapala, Jalisco.
4. Lugares de retiro - Nayarit - Bahía de Banderas.
5. Jubilados - Ajijic, Jalisco.
6. Jubilados – Chapala.
7. Jubilados - Puerto Vallarta.
8. Jubilados - Nayarit - Bahía de Banderas.
9. América del Norte - Emigración e inmigración Aspectos sociales.
10. Estilos de vida - Aspectos Económicos - Jalisco.
11. Estados Unidos - Emigración e inmigración - Chapala, Jalisco.
12. Estados Unidos - Emigración e inmigración - Puerto Vallarta.

II.- Nolen, Michael, autor.
III.-Universidad de Guadalajara, Centro Universitario de Ciencias Sociales y Humanidades, Unidad de Apoyo Editorial.

Primera edición, 2026

D.R. © 2026, Universidad de Guadalajara

Centro Universitario de Ciencias Sociales y Humanidades
Unidad de Apoyo Editorial
José Parres Arias 150
San José del Bajío
45132, Zapopan, Jalisco, México
Consulte nuestro catálogo en: www.cucsh.udg.mx

ISBN: 978-607-646-070-2

Editado y hecho en México
Edited and made in Mexico

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Prologue

By David Truly

I first heard about Ajijic in the winter of 1995 while I was doing research in the state of Chiapas in Mexico examining the history and growth of ethnic tourism for my Master's degree. My research was briefly interrupted by then President Zedillo's decision to send military troops to surround the city of San Cristobal de las Casas during the Zapatista Revolution. The troops sent many of the local people (and my interviewees) scattering into the countryside. One evening in a sparsely populated restaurant, I struck up a conversation with a couple of foreign expats living in San Cristobal. One was a retired businessman from Germany who dabbled in photography and the other was a younger American from Chicago who had retired at 45. I was fascinated by their tales of an expat life in Mexico and even more curious when they mentioned "a big lake outside of Guadalajara where a bunch of gringos live." That piqued my interest and in 1997, my wife and I arrived in Ajijic so that I could conduct research on the nature of retirees in the area and their impacts. That research led me back to the area many times and then in 2007 my wife and two young children moved to Ajijic for the next 10 years. In many ways, I became one of my own study subjects; those years had an indelible impact on my life.

It is no wonder that Mexico is considered a leading destination for international retirement and residential tourism and that reputation has grown due to its exposure in various publications geared to aging Baby Boomers and its geographic proximity to the US and Canada. Although I no longer live in Ajijic, I visit frequently and like many former residents continue to be fascinated by

the continual evolution of these communities and other destinations in Mexico. Tourism and international retirement migration continue to reshape the migration landscape for people of all ages and nationalities and the communities they call home. What distinguishes this study from previous work is its focus on three interconnected themes: the unique geographic relationship between Ajijic and Puerto Vallarta, the growing global promotion of retirement destinations, and the increasing role of political identity in shaping migration decisions. This book offers an historical analysis of the development of these two popular destinations as well as additional socio-demographic data on the characteristics, motivations and attitudes of the migrants with a particular emphasis on their political identity.

Within Mexico, the state of Jalisco has emerged as one of the most important centers of this migration movement and the lakeside communities of Ajijic and Chapala and the coastal region of Puerto Vallarta and Bahía de Banderas attract large populations of foreign residents. Both offer a bucolic natural environment, developed infrastructure, and established expatriate communities, but they are profoundly different in their historical development and appeal. Today both Ajijic and Puerto Vallarta host thousands of retirees although the former attracts more full-time residents than the more seasonal visitors found in Puerto Vallarta. Located a mere 200 miles from each other, these two destinations also have developed a unique spatial relationship over the years. It is increasingly common for residents of either location to visit and often reside part time in the other destination. The proximity and seasonal migration between the two destinations suggests a greater degree of spatial interaction between the more recreational based Puerto Vallarta residents and the lifestyle oriented Ajijic residents. This geographical connection is a unique opportunity to compare and contrast the nature of retirement and expat migration and examine the economic, climactic and lifestyle motivations between two destinations that offer decidedly different types of retirement lifestyle.

Both of these destinations have seen enormous growth over the years due to the ever-increasing media attention and promotion targeting the aging population particularly in more developed regions of the world. As the demand for alternative retirement destinations outside of one's home country increases,

governments have joined forces with advertising and media groups to promote their unique brand, hoping to attract the more affluent classes from abroad. International retirement migration can offer many countries economic relief but can also exacerbate negative host guest relations. Consequently, careful attention to the changing needs of today's and tomorrow's retirees is essential in enhancing the benefits, while mitigating the negative impacts that can result from promoting retirement migration. The survey results offer a more in-depth view of the recreational, cultural, and social activities/resources that attract these migrants and the level of their subjective well-being band satisfaction with life both in Mexico and in their home country. Additionally, the responses explore the cultural and moral identity of the migrants and how that differs between the two destinations. A deeper understanding of the motivations and attitudes migrants bring to a community or country is essential in promoting a retirement lifestyle that acknowledges the diverse and unique needs of different socio economic and demographic groups.

Finally, and perhaps most significant is this book's examination of the political nature and identity of migrants to the Ajijic/Chapala and Puerto Vallarta/Bahia de Banderas communities. Today, it is impossible not to recognize the increasing political polarization and the rise of extremist political positions that can be found throughout the world. The visibility of politics in everyday life has been amplified through social media and the constant chatter has led to conflict and confrontation between different stakeholders. While political attitudes have always played some role in a retirement migration decision, it has never been as significant as it is today. During my research in the late 1990s, there seemed to be a sense of anonymity among the immigrants I interviewed. Religion and politics and even financial means were generally not discussed and displays of wealth or affluence were not commonplace. That has changed dramatically over the years and today, many communities have social groups based on political viewpoints and sadly, confrontations between differing points of view have often erupted into public altercations. The survey presents some clear evidence of how political identity has become a more significant factor in retirement destination decision making. While there are similarities between these two destinations, there are also differences which are significant. These results offer a more

realistic picture of how politics interacts with other push and pull factors that determine destination decisions.

During the nearly three decades since I first began studying retirement migration in Mexico, I have watched these communities evolve in ways that few could have anticipated. This relatively small and specialized migration stream has become a significant global phenomenon shaped by changing demographics, economic conditions, technology, and increasingly by political and cultural identities. This book makes an important contribution to that growing body of knowledge by examining two of Mexico's most influential retirement destinations that share a unique geographical connection. The survey results offer significant insights into the role of politics and political identity in the decision-making process which has policy implications for the global tourism and retirement destination industry.

The authors provide valuable insights not only for scholars and policy-makers, but also for current and future retirees and their work reminds us that migration decisions are rarely driven by economics alone. Lifestyle aspirations, social relationships, personal values, and a desire for belonging are fundamental characteristics that should not be overlooked or undervalued. Having spent much of my academic career studying these communities—and having lived among them myself—I am pleased to introduce this book. I believe readers will find it both informative and thought-provoking, and that it will contribute to ongoing discussions about migration, identity, and community in an increasingly interconnected world.

Introduction

The relevance of a study such as this is easier to grasp if we recall that, as of 2023, Mexico ranks second among the world's ten best retirement destinations, just below Portugal (International Living, 2025). According to various estimates, roughly 900,000 foreigners—primarily from Canada and the United States—reside in Mexico either temporarily or permanently.

Jalisco, for its part, is the second most important destination for international immigration (after Mexico City), as the state hosts three of the largest foreign communities in the country. In this regard, Guadalajara stands out, but the communities on the shores of Lake Chapala/Ajijic and in Puerto Vallarta/Bahía de Banderas are especially notable. Because the latter two localities specialize in tourism-related activities, we can expect important differences in the composition of their foreign populations compared with Guadalajara. In Chapala/Ajijic and Puerto Vallarta/Bahía de Banderas, foreigners are predominantly engaged in *Residential Tourism and International Retirement Migration*, and they are mainly of U.S. and Canadian origin. The state capital, by contrast, is more diverse in the origins of its foreign community and different in the purposes for which people reside there—perhaps more often for work-related reasons. Moreover, given the demographic scale of Jalisco's capital, it is not easy to pinpoint or even discern the spatial, social, or cultural contours of the foreign population living there. This is possible in the other two cases, however, where their presence is unmistakable (Gutiérrez Vázquez, 2022).

We therefore also assume that the profile and degree of impact produced by the foreign population residing in Guadalajara differs considerably from the profiles and impacts characteristic of those living in Puerto Vallarta (and Bahía de Banderas) and in Ajijic (and the Lake Chapala shoreline)—impacts that are deeper and more readily perceptible. Accordingly, this study focuses on the expatriate communities of Ajijic/Chapala and Puerto Vallarta/Bahía de Banderas, the two main national destinations for Canadians and U.S. citizens.

Considering the historical depth of international migration to Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala (dating approximately more than seven decades in the former and more than a century in the latter), along with the explosive growth in immigrant numbers and their distinctive economic, social, and cultural profile, it is not difficult to estimate the magnitude of the impact this migration has had on the evolution of both tourist destinations over the periods in question.

Naturally, there is a substantial body of research on International Communities (foreign or expatriate communities), and there is fairly thorough knowledge of the reasons why foreigners migrate to countries other than their own—climatic and economic factors, as well as culture and lifestyle—together with certain sociodemographic features that characterize host populations. Less frequent are investigations that collect the opinions of international migrants—recording satisfaction with the destinations chosen, evaluations of the goods and services on offer, or views of the host population and the relationships established with it—though such studies do exist in significant numbers. By contrast, analyses of expatriates' cultural or political identity are virtually nonexistent.

Although most research on *Retirement Migration and Residential Tourism* examines North–South migration, some studies address flows in the opposite direction, from South to North. Such is the case of Barbosa, Santos, and Santos (2021), who conducted a qualitative analysis of future Brazilian retirees intending to move to a European country. Evidently, for various historical, economic, and geopolitical reasons, retirement migration most commonly flows from the North to the South.

Before outlining this study's dimensions and variables, it is worth pausing for a brief review of a segment of the abundant literature dealing primarily with

Retirement Migration—the central focus of our interest. *Prior Research on the Foreign Communities of Puerto Vallarta/BB and Ajijic/Chapala* because *retirement migration* largely involves retirees and pensioners, many studies quite logically take as contextual theme the cohort to which much of this population belongs: the postwar or *Baby Boomer* generation. We may begin with what appears to be an incontrovertible fact: given that this generation lived through the most significant period of prosperity in the twentieth century, Rice, Lang, Melzer, and Henley (2010) emphasize that scientific advances in medicine and health sciences, together with new lifestyles, increased life expectancy and made Baby Boomers "the healthiest generation in history."

They are not only seen as a healthy generation; Baby Boomers are also credited with an outstanding cultural imprint. According to Starch (1999), they were—through the end of the last century and the first decade of the present—the most numerous generation in the United States (and, we might add, in Canada) and exerted a profound impact on the era's mindsets, politics, and "social fabric." Starch argues that "from the youth culture of the 1960s and 1970s to the dual-income households of the 1980s and 1990s, this generation has reinterpreted each life stage in succession."

Some investigations focus on *Baby Boomers'* retirement strategies, among which migrating to a destination that is more affordable, more welcoming, and more aligned with their lifestyle expectations naturally stands out. In this context, the *AARP Knowledge Management* (2004) study employs a *psychographic* analysis of how they conceive of and approach that life stage and their future choices.

Such a study becomes more meaningful when one considers the central factor in the matter: retirement pensions. The prior certainty about pensions may not be sustainable over the long term, according to works such as Glascock and Gitelson (2006). Ultimately, at stake is the very future of retirement communities in host countries and of *Baby Boomers'* retirement, together with that of their successor cohorts—*Generation X* and *Millennials*. Hamilton and Hamilton (2006) raised similar questions, but from the standpoint of the social justification of pensions, which they saw shifting from an entitlement to a provision for reducing the risk of falling into poverty. Nevertheless, the authors' predictions—ero-

sion of public support for pensions and the removal of obstacles to governmental reductions—made nearly two decades ago do not appear to be materializing, because strategies for dignified retirement have adapted to times of crisis, above all softening the effects of labor precariousness in developed countries. In any case, it is worth stressing the expectation that, in the medium term, *Generation X* in particular—together with *Millennials*—will progressively replace *Baby Boomers* as the new retirement population migrating to the destinations favored by the latter, where applicable (Fry, 2016). The Boomers opened a spatial and historical trajectory that will very likely remain in force in the future.

Even so, *Baby Boomers* now face significant economic pressures in Canada, and even more so in the United States (and other developed countries), beyond the issue of pensions. Kiy and McEnany (2010) noted among these problems the loss of personal wealth due to global recessions and the rising costs of specialized medical care, to which we might add declines in quality of life and difficulty accessing age-appropriate "amenities." In such circumstances, the most viable alternative is to migrate to a Latin American country; and, according to Kiy and McEnany, the most accessible—by virtue of geographic proximity—is naturally Mexico (see also Lardiés and Montes, 2006; Urquijo, León, and Romero, 2019).

Thus, leading motives for migration often include additional economic reasons such as overall cost of living, precarious employment benefits, and housing prices (Lardiés, 2011; Macguca, 2017; Hayes, 2018; Dixon, Murray, and Gelatt, 2006). Nevertheless, economic reasons are neither the only nor often the principal drivers, as several studies on *Retirement Migration* maintain—and as our own analysis will show. Environmental factors, lifestyle, the search for a better quality of life (Tang and Zolnikov, 2021), climate, the receiving culture, amenities (proximity to the coast or a lake, for example), and the warmth of the host population also matter (Macguca, 2017; Membrano, 2014; Sloane, Zimmerman, and Silbersack, 2020; Hayes, 2018; Benson and O'Reilly, 2009; Domínguez, Rubiales, and Bayona, 2018).

Advanced age determines another important reason to migrate: medical services and access to health care. Hence the frequent attention given to this topic in studies of *Retirement Migration*. Such works analyze how retirees in Mexico confront the challenges of accessing health services (Amin and Ingman, 2010),

and particularly how, for that purpose, they navigate language barriers, informality in the system, and inadequate insurance (Chávez, 2009), or the lack of *Medicare Part B* coverage in Mexico (Iftekhar and Ingman, 2010). Naturally, researchers have also studied how immigrants evaluate medical services in the host country (Sunil, Rojas, and Bradley, 2007).

Beyond the predominance of *Baby Boomers* in retirement migration and the motivations implicit in their decision to change country of residence, *attitudes* toward different aspects of the process—and especially toward the conditions of the chosen destination—also matter (Ancona, 2015). This forms part of the broader topic of *adaptation* to new conditions and lifestyles, addressed by various researchers (Banks, 2004; Vázquez, 2019); it is also linked to processes of interaction with host populations (Márquez, Aday, and Monteblanco, 2024) and to the degree of integration within the foreign community itself, together with its capacity to build *Social Capital* for the benefit of both expatriates and the host community (Simo, Herzog, and Fleerackers, 2013).

The needs of immigrants, their lifestyle, their modes of adaptation to the new environment, their patterns of integration and interaction; social capital; and, more broadly, the *Agency* of members of expatriate communities all form part of the processes that shape their collective action and determine the *impacts of Retirement Migration* on host populations. It should also be noted that a portion of *Residential Tourists* may at some point change their status to permanent residents if they are retirees and pensioners (Huete, 2009).

Among the most important impacts examined by researchers are, first, those of an economic nature in the municipalities that receive migrants and expatriates (Banks, 2006; Burbano, 2013; Lardiés, 2013). The inflow of foreign currency and job creation undoubtedly constitute vital resources for the development of these communities. There are also cultural impacts involving reciprocal assimilation of tastes and beliefs; impacts on the social fabric through the creation of diverse ties between nationals and foreigners; impacts on urban architecture, whether by means of conservation or transformation; and on the typical housing stock; and, finally, on quality of life and consumption styles among the host population. Not all impacts are positive, naturally. Cultural tensions often arise in the interactions between nationals and foreigners (Banks, 2006). Another con-

sequence is the pronounced "aging of the average population in municipalities with greater numbers of foreign residents" (Casado and Rodríguez, 2002). The pernicious processes of *Gentrification* and the displacement of local populations from their traditional habitats should also be mentioned (Cabrera, 2019). Weighing positive and negative effects, Urquijo and León (2019) found fourteen positive impacts versus eighteen negative impacts in their study conducted in Bahía de Kino, Sonora.

Thus far we have mentioned topics commonly addressed in the literature we consulted. The vast majority of studies draw on census data; some include surveys and others in-depth interviews. Few—indeed none that we located—use surveys with a wide range of variables that incorporate less-studied facets of subjectivity such as the cultural and political identity of expatriates, whether permanent or seasonal *("snow birds").* Of the literature reviewed, we found only one study that dealt with the political identity of foreign retirees, for example (Croucher, 2007).

To reiterate, Puerto Vallarta/BB and Ajijic/Chapala are Mexico's two principal destinations for *retirement migration*—U.S. citizens in Ajijic/Chapala and Canadians in Puerto Vallarta/BB in particular—although both nationalities converge in both destinations (together with a smaller, multinational population). These are foreign communities to which many analytical categories can be fruitfully applied, and whose dimensions and variables can be studied along lines similar to those in many of the works cited above, while of course attending to the differences and particular features of each. In fact, this is what several studies of the foreign communities in Puerto Vallarta/BB and Ajijic/Chapala have attempted to do, some of which we mention below.

First, however, a clarification is in order. We found only four studies on Puerto Vallarta/Bahía de Banderas—far fewer than the eleven studies we located on Ajijic/Chapala. Academic interest appears to focus almost exclusively on the latter destination, as can be verified. We do not know the precise reason for this, but two features may help us speculate. We will see that only 24% of expatriates in Puerto Vallarta/BB are *permanent residents*, while *seasonal residents* account for 70%. The reverse holds in Ajijic/Chapala: 78% are *permanent residents*, versus 17% who are *seasonal residents*—or *"snow birds,"* as they are known.

Another reason may be that the foreign community in Ajijic/Chapala began forming in the late nineteenth century, whereas the community in Puerto Vallarta/BB began to take shape only in the late 1940s. Additional characteristics that we analyze may also make the Lake Chapala shoreline a more attractive subject for academic research as a *retirement destination*, while Puerto Vallarta is *much more attractive to national and foreign tourists* in general, as well as to *residential tourism*. Naturally, when studies focus exclusively on tourism, Puerto Vallarta receives far more academic attention.

In a study conducted two decades ago, Massam and Everitt (2004) undertook a rather original investigation focusing on *public plazas*—viewed as relevant *civic spaces* in Puerto Vallarta—where expatriates and the local population can converge and interact. They argue that "the plaza remains a vital public good, even if its social function is changing."

Kiy and McEnany (2010) revisit interest in *Baby Boomers* and economic pressures—high medical costs and the risk of personal-asset loss—as drivers of emigration from the United States to a variety of increasingly popular destinations in Latin America. Among these, several Mexican locales are cited as privileged sites, with Puerto Vallarta among the most prominent.

Shibya (2018) conducted a qualitative study documenting *Baby Boomers'* social representations regarding retirement in Puerto Vallarta and the broader Bahía de Banderas area, where they reproduce lifestyles from their countries of origin, reinforce cultural values, and—through interaction with local communities—disseminate valuable civic attitudes. Civic ties, together with strategies and patterns of adaptation and assimilation into the surrounding environment (which differ by expatriates' migratory status), are observed in a subsequent study by Shibya and Holstein (2019).

The earliest research we found dates to the mid-1970s (Stokes, 1976) and examines settlement patterns, relationships, social networks, and cultural adaptation in the retirement community of Ajijic/Chapala, as well as how migrants recreate "U.S. environments" abroad. At the other extreme, the most recent works are by Gutiérrez Vázquez (2022) and González-Rojas and Aikin Araluce (2022). The former, based on population and housing census data, draws inferences about the distinct migratory profiles of Guadalajara and Cha-

pala; the latter, following Truly (2002), studies a matrix of changes in retirement migration to Ajijic in particular.

David Truly is a long-standing U.S. expatriate resident in Ajijic who, among other contributions to the locality, authored one of the most influential and frequently cited studies—referenced not only by González-Rojas and Aikin Araluce but also by subsequent investigations. Truly (2002) examines behavioral differences between earlier and more recent waves of migration to the Lake Chapala shoreline, and how distinct categories of expatriates interact with the local community and make use of tourism services offered by the host population.

Tony Burton, a Canadian national, has likewise produced pioneering work of extraordinary breadth, documenting the figures who have passed through the Lake Chapala area since the mid-nineteenth century. In addition, Burton compiled an exhaustive register of the most emblematic names within the foreign community in Ajijic and Chapala—whose formation began in the early twentieth century and continued through the century's final decades (Burton, 2008; 2015; 2018; 2022).

A more conventional approach is found in Sunil and Rojas (2007), who investigate the reasons U.S. retirees migrate to the Lake Chapala shoreline. Economic motivations, financial security, and medical care naturally stand out, but they add the natural environment, a friendly sense of community, improved quality of life, cultural adaptation, and aspects related to personal identity. A similarly broad range of variables appears in Kiy and Lambert (2009), who likewise attempt a comprehensive view of foreigners' living conditions in Chapala. Díaz Copado (2013) focuses on a relatively understudied aspect, analyzing the cultural and urban transformations associated with retirement migration in the town of Ajijic, incorporating the views of authorities and local residents. Raditsch (2015), for his part, records Mexican residents' perceptions of some of these impacts, also along the Lake Chapala shoreline. A related study is Urquijo, León, and González (2022), who also document how Ajijic residents evaluate the impacts derived from the presence of a large foreign community. Wallace (2010) captures both the local population's and expatriates' perspectives in Chapala, where coexistence in this "affordable paradise" is also traversed by "global North–South tensions." Durand (2007) offers a contrasting comparison of "cultural

enclaves" in San Miguel de Allende and Chapala—enclaves that "replicate the U.S. lifestyle," often without integrating into the local population.

Cohen (2021) ventures into notably original terrain, focusing on the way "cuisine and taste become symbolic tools for negotiating cultural and social identities in the process of integration" of the foreign community into the surrounding environment in the Chapala–Ajijic area.

Finally, we should highlight an important article by Croucher (2007) on political identity, which explores how U.S. migrants in Mexico maintain their political identity and civic ties to the United States even while residing abroad. Through interviews and analysis of political behavior, Croucher shows that many continue to vote in U.S. elections, discuss politics actively, and organize within ideologically engaged communities. The study underscores that retirement migration does not entail a rupture with the country of origin but rather a form of *transnational citizenship* anchored in privilege and access to mobility.

Structure and Thematic Content of This Book

This book presents the results of the comparative research we conducted between late 2019 and early 2020 (fieldwork) and from 2020 to 2022 (documentary research). The findings are presented in the two Parts into which the book is divided. Part I offers a sample of names of individuals who have been significant in the formative processes of both foreign communities. Chapter 1 lists key figures—chroniclers and travelers who brought Chapala to international attention, cultural celebrities who have visited the lakeshore at one time or another, and some of the pioneers and architects of the expatriate community in Chapala, Ajijic, and neighboring towns. Chapter 2 proceeds in the same vein, mentioning early foreign figures in mining and agriculture; celebrities who have passed through Puerto Vallarta (mostly from the film world); and individuals who have been architects of the foreign community in Puerto Vallarta and Bahía de Banderas.

Part II sets out and analyzes the results of the Survey of Attitudes and Values that we administered in both communities during the dates noted, addressing mentality—that is, the set of beliefs, values, and attitudes of expatriates in the two foreign communities under study. It should be noted that this was a subs-

tantial survey encompassing a wide variety of dimensions and variables—an unprecedented breadth, to our knowledge, in studies of retirement migration.

Part II comprises four chapters with their corresponding thematic divisions. Chapter 3 records the sociodemographic profile of foreigners and includes age, sex, marital status, length of residence, and nationality; as well as living conditions, including housing and the degree of satisfaction it elicits, perceived security in the area of residence, and, finally, access to health services together with opinions on their quality and monetary cost. Chapter 4 addresses variables grouped under the *sociocultural* dimension: motivations for choosing either destination as a place to retire; expatriates' usual recreational activities; lifestyle; and self-perceived subjective well-being, including feelings of happiness and satisfaction with personal life. It also includes variables that measure social capital—interpersonal trust, associational life, and philanthropic activities. Chapter 5 studies *cultural identity* and what we call *Public Morality*: private matters that are debated in the political sphere *(a biopolitical dimension)*. Finally, Chapter 6 analyzes variables related to *political identity*, grouped into interest in politics, democratic identity, left–right self-placement, liberal–conservative self-placement, party identification, and the parties with which U.S. and Canadian respondents primarily identify.

As will be evident, Part II devotes ample space to the study of the cultural and political identity of the foreign communities under examination. We take this to mean probing their cultural subjectivity—or, as noted, their mentalities. By this term we refer to a set of attitudes, beliefs, values, and representations we deem relevant to describing and understanding the particularities and differences within and between these communities and in relation to the general populations of their respective countries of origin.

We maintain that it is increasingly necessary to strive for the most integral and exhaustive understanding possible of these international communities—one that includes, beyond common demographic and economic variables, their social, cultural, and political traits, in a word, their identities. Alongside this, it is essential to connect such traits and characteristics to the evolution of both urban destinations—Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala. To that end, we analyze the dimensions and variables commonly studied in prior

work, but we also aim to go beyond the canonical list of characteristics typically investigated. As far as we are aware, very few studies exist on the history of these communities, and those that do often focus on only a handful of characteristic features. What is most lacking are studies that address the subjectivity and identity of expatriates residing in Mexico—and especially in Jalisco. We found no works that explore their core attitudes and values, nor their political identity together with party identification. Moreover, international or expatriate communities are often presented as largely *anonymous*. From the broad literature on the topic, we were able to locate only the works of one Canadian researcher who assigns names to the foreigners who have migrated specifically to the Lake Chapala shoreline.

These two dimensions are therefore the focus of the present work, which seeks to contribute analytical elements to the current state of the question and open new avenues for research in this vein.

Finally, to carry out the research whose results are presented in this book, we received support from the University of Guadalajara, the institution where we work. Through the Research Coordination Office of the University Center for Social Sciences and Humanities (CUCSH), we obtained funding to conduct fieldwork and survey a significant sample of the foreign populations of Puerto Vallarta and Bahía de Banderas (383 cases) and Ajijic and the northern Lake Chapala shoreline (399 cases). For the interviews, we used an English-language version of the questionnaire, plus a French version for Canadian respondents from the province of Quebec (see Appendix 1 and Appendix 2). The samples were non-probabilistic, and interviews were conducted at strategically selected points. We omit citing a source in the tables presented throughout the book because they report data originating from these surveys; we indicate a source only when the information comes from the World Values Survey.

In Puerto Vallarta, we received invaluable collaboration from Kelly Trainor, U.S. Consular Agent, who greatly facilitated the survey's implementation. Pilar Pérez provided invaluable press materials for tracing important names in the history of Puerto Vallarta's expatriate community. We also received assistance from Eleonor Hawthorne, who played a key role in reviewing the questionnaire, offering comments and suggesting corrections, and helping translate it from

Spanish into English. In the same vein, we received valuable assistance from Rebeca de Santiago, a distinguished Puerto Vallarta businesswoman. Daniel Palacios, Zoila Cortés Guardado, Sayuri y Kumiko Villaseñor, Midori de León Shibya, Naomi López Shibya, Iliana Álvarez and Yadira Delgado were instrumental in administering the survey. In Chapala and Ajijic, we benefited from the selfless advice and observations given to us from the David Truly, and from Lynn Gustadt, Patrick O´Heffernan, and Paola Waterlot. We also would like to thank David for his invaluable reflections that begin this work i the prologue. The Lake Chapala Society allowed us to use their facilities to inform the community about the survey and conduct many interviews at their headquarters in Ajijic. We want to mention Tony Burton, a Canadian professor who resides for periods in Ajijic, and who has written an extensive work where he meticulously records the names of a multiplicity of individuals who have passed through or lived in the Lake Chapala area and especially in Ajijic. Although we could not speak with him personally, we benefited from his important research work. To Midori de León Shibya, for translating the text, to Agatha Nolen and Chris Shelton for their reading and comments. Finally, we wish to express our sincere gratitude and recognition to each of the individuals and institutions whose support made this work possible. We extend our deepest appreciation to the institutions that co-published this volume, including the University Center of Chapala at the University of Guadalajara, and its Rector, Patricia Rosas Chávez, PhD, who serves as the head of the University Center, for her thoughtful understanding and invaluable support. We are equally grateful to the leadership of the Lake Chapala Society, particularly Steve Balfour and Víctor Camarena, for their unwavering, insightful, and generous collaboration.

PART I.
On the Origins and Formation of the Foreign Communities of Chapala/Ajijic and Puerto Vallarta/Bahía de Banderas

CHAPTER 1.
Ajijic / Chapala

As might naturally be supposed, the expatriate communities in Vallarta/Bahía de Banderas and in Ajijic/Chapala have a history behind them and have taken shape gradually, expanding in both number and location over time. Considering their respective stories, we find an interesting difference between the two communities at this point. Chapala was already a tourist destination with a certain international presence when Puerto Vallarta was still a small coastal village, practically isolated from the world, whose inhabitants were mainly engaged in fishing and agriculture.

In the final two decades of the nineteenth century, Chapala became a national and international tourist center, whose natural attractions—those proper to a lake of its magnitude—were a powerful magnet for the kind of tourism characteristic of that era. Alongside the beauty of the lake—then and still today—the place also stood out for its extraordinary temperate climate and its hot springs, which at that time were particularly valued for their therapeutic properties. Soon to be added to these were the business opportunities offered by incipient mining, or even the news that petroleum deposits might exist in the lake (Burton, 2008). All these qualities of the water body, as well as of the town itself and its surroundings (primarily Chapala and Ajijic), constituted diverse factors that awakened the interest of a notable variety of international visitors, among whom were the first expatriate residents—the seed of a community that would begin to expand significantly over time and with the turn of the century.

It has even been said that Chapala was "Mexico's first tourist destination" (and that Porfirio Díaz was one of the first tourists, owning a property there) (EL Bable, 2012). This would have occurred as early as 1885, and soon, also at the end of the nineteenth century, "another immigration wave… with the arrival of people from abroad who, attracted by the beauty of the lakeshore and the benefits of its climate, built the first 'summer' estates that gradually transformed the landscape of this 'fishing village'" (Guadalajara de Ayer, 2010).

Because Chapala had by then become an emerging recreational and vacation destination for the inhabitants of Guadalajara as well, some affluent figures from that city and from other parts of the country—together with the first foreign residents in Chapala—set about constructing luxurious estates in several notable cases, thereby transforming the village into a town with a growing and spectacular architectural heritage that added to the attraction of the lakeshore and of the town itself.

Lake Chapala acquired international fame by various means, one of which was the guides, writings, and reports of international travelers who passed through in the nineteenth century (and the first decades of the next), where they shared laudatory descriptions, anecdotes, and testimonials about its virtues and attractions. Their value is evident if we recall that at that time there were no electronic media, radio, cinema, or television, so these writings were fundamental in shaping the decisions of potential travelers, especially those in other parts of the world. It is therefore worth listing some names, carefully documented by the Canadian writer Tony Burton in his book *Lake Chapala Through the Ages*, one of his studies that we will cite extensively in this section.

Travelers and chroniclers: Chapala's window to the world

Among the early descriptions of Lake Chapala is one found in the book *Le Mexique* by the Frenchman ***Mathieu de Fossey***, who visited the lake in 1857 (Burton, 2008, p. 92). Burton notes that De Fossey's book was a valuable source of information for many diplomats stationed in the country.

A few years later, in 1864 or 1865, the Englishman ***William Henry Bullock*** traveled around the lake and its surroundings and recorded his impressions of

Chapala and nearby cities (La Barca, Ocotlán) in his book *Across México 1864–65* (Burton, 2008, pp. 98–103; see also Ramos Delgado, 2016).

Similarly, another English figure, ***Rose Georgina Kingsley,*** recounts comparable details of the same places in 1871, in a section of her book *South by West; or, Winter in the Rocky Mountains and Spring in Mexico* (1874) (Burton, 2008, pp. 113–116).

A lyrical and far more laudatory—though "inaccurate"—description of Chapala's natural wealth and beauty is offered to readers by the Belgian writer ***Félix Léopold Oswald*** in his book *Summerland Sketches: or Rambles in the Backwoods of Mexic*o; he is thought to have visited the lake around 1880 (Burton, 2008, pp. 117–119).

By contrast, only a brief description of Lake Chapala appears in *Appleton's Guide to Mexico*, a tourist guide written by the American ***Alfred Ronald Conkling*** and dated 1886 (Burton, 2008, p. 120). Conversely, "a vivid description of Lake Chapala" in that same year can be read in the Swiss ***Ernst von Hesse-Wartegg's*** *Land und Leute* (1890) (Burton, 2008, pp. 121–124).

In another book titled *Mexico? Sí Señor* (1893), ***Thomas L. Rogers*** (United States) also sketches a seductive image of Chapala and even ventures to predict its future. He writes: "Chapala is near to being the largest body of navigable water on the globe, and now that it is easily accessible, it is destined to become a great *resort*, highly agreeable to many people" (Burton, 2008, p. 133).

Reau Campbell was another North American traveler who frequented Mexico, a country he toured on several occasions. As the result of "a decade of visits," he produced a thorough and extensive travel guide in 1895, titled *Campbell's Complete Guide and Descriptive Book of Mexico*, a work reissued several times. Naturally, it contains an account of Chapala's attractions and those of the lake, with praise that cast both the town and the water body as valuable draws for tourists, expatriates, and international travelers (Burton, 2008, pp. 150–152).

Charles Fleming Embree, a young American writer, lived with his wife for eight months in Chapala at the century's end, in 1898. The experience inspired the creation of a novel whose central plot unfolds precisely along the lakeshore and in the town of Chapala. The work is titled *Dream of a Throne: The Story of a Mexican Revolt*:

> It is a novel of war and adventure, and thanks to the strong contrast among its characters, they radiate vitality and realism. The writer's exhaustive knowledge of Mexican life provides him with a wealth of new material; and the descriptions of the settings on Lake Chapala are vivid and colorful, pulsing with the mountain air. (Burton, 2008, pp. 153–156)

Naturally, as the century turned, articles, writings, and travel guides about the features and attractions of Lake Chapala and the lakeshore towns—chiefly the town of Chapala itself—continued to appear. Between the first such work cited here, Mathieu de Fossey's *Le Mexique*, and the early years of the twentieth century, almost five decades elapsed. In that time, the tourist destination evolved in several respects: easier access thanks to improvements in transportation, urban enhancements, the opening of some hotels, inns, and tourist services, and the construction of numerous houses, villas, and mansions that transformed Chapala's urban landscape with works of indisputable architectural value—making it ever more alluring to national and international tourists.

In the cited book *Lake Chapala Through the Ages*, Burton continues to record travelers' accounts, tourist guides or personal memoirs, and some expatriate residents in the twentieth century, but only up to 1910.

The first appears precisely in 1900, when the British ***Maud Pauncefote*** wrote the first article devoted entirely to Lake Chapala *(Chapala the Beautiful)*, as laudatory as several of the travelers' writings that preceded her. In one paragraph, *Pauncefote* wrote:

> On the western slope of mountainous Mexico there is a marvelous lake that recalls the size and surroundings of Lake Geneva. It is called Lake Chapala; and as it is off the beaten track, many visitors who think they have seen Mexico are entirely mistaken in not knowing this interesting place. (Burton, 2008, p. 165)

About the town, *Pauncefote* also drew a complimentary picture: "The little town of Chapala nestles under the mountains at the lake's edge. There lives a small settlement of foreigners who, upon discovering the charm of the place,

have built villas on the lakeshore where the air is of considerable benefit to the lungs" (Burton, 2008, p. 166, emphasis added).

Also English, ***Ethel Brilliana Harley*** was a professional travel writer who toured Mexico between 1900 and 1901 and, of course, visited Chapala. In her book *Mexico as I Saw It*, "she describes her visit to Lake Chapala in simple, straightforward language appropriate for a wide variety of readers. Her writing is full of anecdotes and comparisons with other places she knew" (Burton, 2008, p. 169). In *Brilliana's* words, "Chapala enjoys a glorious climate, abundant tropical vegetation; and birds and animals from every clime take refuge on the lakeshores when the cold forces them to migrate south. There are very tall plants, bougainvillea twenty or thirty feet high—in bright red, purple and violet; also geraniums and coconut palms. Delicious fish abound in the lake, which measures about eighty miles in length" (Burton, 2008, p. 171).

Chapala was also visited by archaeologists and, in this case, ornithologists. Two of the latter, ***Charles William Beebe*** and ***Mary Blair Rice***, arrived in 1904 and in their book *Two Bird-Lovers in Mexico* left testimony of the profound impression Chapala made on them: "... when the wonder of bird-life at Lake Chapala and its marshes was revealed to us, the feelings we experienced cannot be expressed in words ... in these waters and marshes we saw not individuals or flocks but a veritable world of birds!" (Burton, 2008, p. 175).

Another naturalist, the Italian ***Adolfo Dollero***, recounts his travels in Mexico in 1907 in his "voluminous" book *México al día*, published in 1911. In Burton's words, "Dollero's account of Lake Chapala includes descriptions of several surrounding towns, the climate and fertility of its shores, the gold and silver mines in the area, and even the names of the largest landowners…" (Burton, 2008, p. 182).

A record of "contrasts" concerning Chapala is found in the writings (*The Wonderland of the South*) of another English journalist, ***William English Carson***, who visited in 1909. Among the negatives (he was the first to note the water hyacinth infestation, caused by "some imbecile") and the positives he observed, one favorable comment stands out: "Chapala is beautiful in all seasons, but looks especially charming as the day declines; indeed, it is famous for its sunsets. The

broad expanse of water with its mountainous backdrop then becomes something of enormous beauty" (Burton, 2008, p. 189).

In that same year, 1909, another American, ***Thomas Philip Terry***, wrote his "traveler's manual"—*Terry's Mexico Handbook for Travellers*—which includes varied data on Chapala (distances to nearby cities, ways of getting to the town, some of its features, hotels, boats, and rivers). But what is interesting, as Tony Burton observes, is that it was precisely this manual that convinced the famous English writer D. H. Lawrence that he ought to visit Chapala, where he wrote part of his novel *The Plumed Serpent* (Burton, 2008, p. 190).

In the works referenced thus far there are mentions of the foreign community that was beginning to take shape (primarily) in Chapala. I mentioned that affluent families from Guadalajara built chalets, villas, and mansions along the lakeshore, in the town and to its north. It is also part of Chapala's history that Porfirio Díaz had a house and came to vacation there, along with other members of the Mexican "élite." It is therefore interesting to refer to another traveler, this time Polish-Russian, who complements the naturalistic descriptions of almost all the foreign figures mentioned here with an interesting and broader record of Chapala's social life.

In his book *Dix mille kilomètres à travers le Mexique 1909–1910*, ***Witold de Zyszlo***, besides referring to water sports, hunting, fishing, and hot springs, offers a brief description of the elite and the *socialité* who enjoyed Chapala in the first decade of the new century. From the excerpt selected by Burton stands out the chronicle of regattas during Holy Week of 1909 in Chapala:

> The President (Díaz, of course), dressed in a navy-blue suit and a Panama hat, was accompanied by his wife, dressed entirely in black, and his daughter Luz in an elegant outfit. Among other representatives of high society… were the Minister of Finance Mr. Yves Limantour, to whom the country owes the consolidation of the foreign debt; Mr. Braniff, a railroad king… and Mr. Moreno, whose profits reach fabulous sums… Also present were Mr. Landa, Governor of the State of Mexico; Mr. Ahumada, Governor of the State of Jalisco; Mr. Escandón, Governor of the State of Morelos; and ladies Corcuera, Cuesta, Cosío, Hermosillo, Malo, Del Valle, etc. (Burton, 2008, p. 200)

In the second decade of the twentieth century, travel chronicles about Mexico—and Chapala—diminish and come to a halt. One of the last, noted by Tony Burton (no longer in the book so often cited above), is that of the American ***Harry Frank*** in 1912. When Frank arrived in Chapala, he found the hotels closed, except for the "Hotel Víctor." After complaining about the high price of the uncomfortable hotel, he was grateful that "at least the owner lent him a pair of bathing suits for moonlight swims in Lake Chapala, whispering some secrets to its sandy beaches in the silence of a silvery night" (Burton, 2018).

Evidently the most compelling reason why visits, records, and travel chronicles in Mexico became complicated, altered, or stopped altogether was, of course, the Mexican Revolution and the ensuing difficulty of traveling without the usual problems associated with a nationwide armed conflict. It is also likely that Tony Burton ends his inventory of international travelers who visited Chapala for this same reason.

Once the armed struggle of 1910–1917 had concluded, and by the time Chapala had become a resort of international renown, travelers' accounts may have changed and diminished in importance and perhaps also in character and purpose. It is possible that from then on the "trade" became institutionalized and began to be carried out by the tourism establishments themselves (hotels, restaurants, government offices, merchants, etc.). Over time, advances in communication and transportation helped Chapala's fame to grow, and with it the number of foreign tourists—conventional tourism, but also "residential tourism" as well as "*retirement migration*," which enlarged and shaped the international resident community in the area of Chapala, Ajijic, and surrounding towns.

Be that as it may, all these chroniclers were key promoters of Lake Chapala and the town of Chapala on the international stage. Their news, chronicles, comments, and anecdotes surely caught the attention of more than one foreigner who became interested in the destination and decided to visit (as happened with D. H. Lawrence) and perhaps later to live there with some degree of permanence. From the 1860s through the first decade of the next century, they prepared what would begin to unfold in the 1920s and subsequent decades of the twentieth century.

It is important to note that the great majority of the chronicles speak first of the lake and its qualities, then of the town of Chapala, and then of the surrounding populations (La Barca, Ocotlán, Atequiza, Tizapán), in addition to the lake's tributaries, the Lerma, Santiago, and others. Little is said about localities closer to Chapala, such as Ajijic or Jocotepec. One exception is ***Charles Fleming Embree***, who in the novel mentioned here situates some passages in the nearby town of Ajijic. He noted that the plot takes place in the mid-nineteenth century, making it a very early mention of Ajijic—then a settlement with very few inhabitants and almost disconnected from Chapala (Burton, 2008, pp. 154–155).

Another name from the second decade of the new century, cited by Tony Burton in another of his books (2022, p. 8), was the screenwriter ***Charles Kaufman***, who also lived in Ajijic for several months in 1929. Some time later Kaufman would dedicate his first and only novel "to the good people of Ajijic" (Burton, 2022), the lakeside settlement that by then was beginning to arouse the interest of foreigners in addition to Chapala.

After the most intense phase of armed struggle in Mexico had passed, the 1920s saw the arrival of new expatriates who made Chapala a destination for short visits or their place of residence, whether temporary or permanent (very few). In this decade, immigration also began to look toward Ajijic, which in any case is closely linked to Chapala. Even so, the process of shaping the foreign community in the area would balance between both towns and later tilt visibly toward Ajijic (and surrounding localities) as the main destination.

Visiting celebrities

From the second decade of the new century onward, some celebrities and internationally famous figures also began to arrive. It is worth referring to them, although their number is small, because they nevertheless gave an added boost to the fame and image of the lakeshore and of the towns of Chapala and especially Ajijic.

The most celebrated of the early outsiders to arrive in Chapala in the second decade of the twentieth century could not have been more illustrious or renowned. In April 1923, after passing through Guadalajara on his tour of the

country, the famous and controversial English writer ***D. H. Lawrence*** and his wife ***Frieda*** arrived in Chapala. They settled immediately in the Hotel Arzápalo and later rented a house where they would stay during the months of their sojourn—today a well-known museum. Because the echoes of the Revolution had not entirely faded, Lawrence harbored doubts about making any major decision. In June 1923 Lawrence wrote to a friend: "one could easily get a little place here (Chapala). But now more revolution is expected and it's very risky. Besides, why should one build a place and make it nice only to have it destroyed afterward?" (Ruffinelli, 1977, p. 27). Despite these reasonable doubts, Lawrence nevertheless found a special tranquility and peace at a lake he considered "beautiful, very beautiful." Hence, as Ruffinelli wrote, "in Chapala life slipped by quietly" for Lawrence and his companions (p. 28), and thanks to this unusual calm, *Lawrence* had finished by late 1923 the first draft of his novel *The Plumed Serpent*. Lawrence would return to Chapala on October 21 of that same year, 1923, but this time disappointed because his longed-for project of establishing, with his friends, "a primitive community" had definitively "come undone." This is why he wrote to a friend: "you see, I have tried Mexico again. I was in Chapala for a day yesterday. The lake is more beautiful than before, very beautiful, but somehow it seemed strange to me. And with a feeling of suspense, of waiting for something to happen—something I want to avoid" (Ruffinelli, 1977, p. 30). Ruffinelli commented that the peace *Lawrence* had experienced "could only have been in Chapala, but when he returned a second time he felt the 'suspense, the expectation of something fearful he wanted to avoid at all costs': Chapala's peaceful charm vanished, and perhaps for that reason when he returned in 1924 (to Mexico), again with *Frieda*, that was no longer the place of his search but rather Oaxaca" (Ruffinelli, 1977, p. 32). In any case, ***D.H. Lawrence's*** name would be forever inscribed in Chapala as one of its most honorable and memorable presences, still resonant today.

That same decade, in 1929—after passing through Mexico City and meeting with the Mexican president, Emilio Portes Gil—and at the invitation of Zara "La Rusa" and her mother, one of the most renowned figures in his field and in Chapala's history came to the town: the guru and yogi ***Paramahansa Yogananda***, founder of the *Self-Realization Fellowship* and author of an equally famous

book, *Autobiography of a Yogi*, published years later in 1946. To gauge the reach and influence of both the figure and this book in particular, it is worth noting that one of its most devoted readers was none other than Apple's founder, Steve Jobs (Burton, 2015). The impact on Chapala's international fame could only have been substantial. In one of the most iconic photographs of Chapala, *Yogananda* can be seen standing on a sailboat of the era—a photo that circulates widely in online publications by businesses and tourism offices in Chapala and Ajijic.

Burton records that, following in D. H. Lawrence's footsteps, "the famous American writer, composer, and translator ***Paul Bowles*** (1910–1999) was a frequent visitor to Mexico in the late 1930s and early 1940s, before moving to live permanently in Morocco in 1947. Bowles spent a few weeks relaxing in Ajijic, on the shore of Lake Chapala, in the first half of 1942" (LakeChapalaArtists.com, 2016). It should be noted that *Bowles* interacted with writers of the *Lost Generation* (Ezra Pound, Djuna Barnes, Gertrude Stein), the *gay society* (Luchino Visconti, Tennessee Williams, Truman Capote), and members of the *Beat Generation* (Jack Kerouac, William Burroughs, Allen Ginsberg) who traveled to Morocco to visit him (cf. Wikipedia), attesting to his relevance as a writer and to his existentialist leanings. It is also noteworthy that one of his works, the novel *The Sheltering Sky*, was adapted for film by the Italian director Bernardo Bertolucci in 1990, starring Debra Winger and John Malkovich, with *Bowles* himself appearing in advanced age.

Three years after Bowles's stay, the renowned American playwright ***Tennessee Williams*** also stayed in Chapala—from August to July of 1945. During those months, Williams took advantage of the tranquility of the place to write his well-known play "*A Streetcar Named Desire*". As is known, the piece would be brought to the screen by *Elia Kazan*, starring Marlon Brando and Vivien Leigh. *Williams's* stay in Chapala, writes Burton, "proved to be a productive period in his career as a writer" (LakeChapalaArtists.com, 2014). Williams himself wrote: "I settled meantime in Chapala, Mexico, to work on the play called *A Poker Night*, which I later titled *A Streetcar Named Desire*." According to Burton, while in Chapala Williams also wrote several poems. One of them, titled "Recuerdo," he dedicated to his grandmother and his sister Rose. He also reworked another poem written in 1944, "Idyll," which he retitled "Lady, Anemone" (when publi-

shed, the poem carried the dateline "Lake Chapala, Jalisco, Mexico, July 1945") (Burton, 2015). Williams was thus in Chapala eighteen years before he went to Puerto Vallarta to attend the filming of *The Night of the Iguana* in 1963.

Also in 1945, the renowned German–American psychoanalyst ***Karen Horney*** spent a few weeks in Ajijic, where she worked on one of her books ("Are You Considering Psychoanalysis?"). During her stay in the town, *Horney* lodged at *Casa Heuer* (Burton, 2015, p. 50). She is especially recognized for her emphasis on personality and culture as explanatory factors for neuroses, as opposed to innate or libidinal drives as maintained by Freudian psychoanalysis (Fernández & Tamaro, 2004). Unsurprisingly, her presence in Ajijic helped spread the site's appeal beyond literature or film—into academia, for example—which would decisively influence the type of foreign immigration to the Lake Chapala lakeshore.

Among other personalities who passed through Chapala and Ajijic in the 1950s, Burton records several figures of the *Beatnick* movement, then in its heyday. This was the case with two of its most conspicuous representatives, according to Burton: Allen Ginsberg and Jack Kerouac. Ginsberg was in Ajijic in 1951, accompanied by Lucien Carr and Joan Vollmer, where he visited "his first love," Helen Parker (2022, p. 160). In turn, in 1952 Kerouac "passed through Ajijic on his journey to Mexico City" to meet there with William Burroughs, the third of the most important writers of the Beat Generation. Other members of the same movement who were on the Lake Chapala lakeshore in those years were the poet ***Ruth Weiss*** and the painter and photographer ***Ernest Alexander*** (Burton, 2022, p. 161). ***Norman Mailer***, another major American writer, was allegedly in Ajijic occasionally, and later stayed for a somewhat longer period (several months) at the end of the 1950s and beginning of the 1960s (Burton, 2022, pp. 62–63; see also LakeChapalaArtists.com, 2018).

According to Burton again, by the mid-1960s, occasional tourists increasingly included individuals and figures associated with the *Hippie* movement. This affected the image that the foreign population projected among local residents, since—as Tony Burton adds—the disruptive practices and culture of the *Hippies* exceeded "tolerable" limits for many Mexicans, tolerant yet more attached to forms and customs incompatible with the "scandalous" behavior of many of the

hippies who passed through Chapala and Ajijic in those years (Burton, 2022, pp. 160–171).

While the *hippie* expeditions to Chapala and Ajijic lasted, other visiting celebrities also appeared for short periods, such as some members of the psychedelic rock band ***Jefferson Airplane*** and the guitarist and singer *Chrissie Hynde*—who a decade later would become the leader of The ***Pretenders***; and ***Jerry Garcia*** of the *Grateful Dead* may also have made an appearance in Chapala (Burton, 2022, p. 171).

The fame once enjoyed by the town of Chapala and its impressive architecture had, by the beginning of the second half of the century, shifted definitively toward the town of Ajijic, without Chapala's name necessarily losing luster (Palomar, 2014). The same occurred with the settlement of expatriates along the lakeshore, which was progressively dominated by individuals from both Canada and the United States.

Pioneers and architects of the foreign community in Chapala, Ajijic, and nearby

Someone once remarked that "the largest and oldest community of North American expatriates lives on Lake Chapala" (Schaffran & Monkkonen, 2011, p. 225). Tony Burton's tracing of the footprints left by foreigners in Chapala and Ajijic since the mid-nineteenth century confirms the antiquity—though the claim of being the largest may be debatable.

In any case, one of the first foreigners known to have come to reside in Chapala (Burton, 2008, p. 130) was ***Mr. Duncan Cameron***, a Scot who served as Director of the *Lake Chapala Steamboat Company*, the same company that in 1868 launched the famous steamship *Libertad* (Burton, 2008, p. 130)—celebrated for being the main means of transport between lakeshore towns and also for its notorious sinking in 1889.

Another early foreign resident was the Englishman ***Septimus Crowe***. *Crowe* arrived in Chapala in 1895 to treat his arthritis with the sulfurous waters abundant along this part of the lakeshore and, enchanted with the place, decided to buy a plot on a "little hill" with an excellent panoramic view, where he built his residence, which he called *Villa de Monte Carlo* (Burton, 2008, p. 157).

Also around 1895 a perceptive Spanish "peninsular***", Ignacio Arzapalo Palacios***, visited Chapala, when the guesthouse run by "Doña Trini," according to testimonies, was the only lodging available in Chapala at that time—so the Spanish visitor had no other option. Faced with "the growing tourism boom and armed with a grand vision, ***Don Ignacio Arzápalo*** decided to build a hotel"—the *Hotel Arzápalo*—which, being the only hotel in those years, "proved to be a great success, since during holiday seasons it was filled to the brim" (Ramírez, 2017). The hotel became famous, though over the years it would change its name to *Hotel Nido*, and the building has recently been refurbished as Chapala's municipal palace.

By 1995 a peculiar figure of German origin had also acquired mines and large tracts of land around Chapala, Ajijic, and San Antonio Tlayacapan, not always by the best of means. ***Hans Jaaks*** was a wealthy man who amassed a fortune in Guadalajara as a pharmaceutical entrepreneur. His relations with some people in these localities were complicated, culminating in a tragic event: answering a knock at the door of his house in Ajijic, Jaaks was murdered at 7:15 a.m. on October 31, 1896 (Burton, 2022, pp. 13–14).

At the turn of the century—and especially from the second decade of the twentieth century, as already noted—an incipient foreign community was already forming in Chapala's urban area. Although she did not live in Chapala, where her father owned a small house, ***Ida Purnell*** was a writer of children's books who lived in Guadalajara, where she worked as a secretary at the U.S. consulate. This did not prevent her from forging deep ties with both Chapala and Ajijic. She had been a student of the poet ***Witter Bynner*** at the University of California and interacted closely with *D. H. Lawrence* during his stay in Chapala, together with *Bynner* and his partner. She would also maintain ties with another of the most celebrated women in that incipient but already important foreign community (Burton, 2022).

Like many foreigners, when the Norwegian ***Paul Christian Schjetnan Hansen*** visited Chapala in 1908 he was enthralled by the many natural attractions of the lake and its surroundings and decided "to spend the rest of his life there," with several business projects in mind. The Revolution forced him to pause them, but in 1917 he immediately put into operation two steamships, one for

cargo and the other for passengers. His most ambitious project, however, was the construction of the railway line between Chapala and its junction with the national railroad at La Capilla, near Atequiza, together with the building of the Chapala railway station, a handsome building designed by Mexican architect Guillermo de Alba and inaugurated in 1920 (Burton, 2008, p. 192).

Hans Alexander von Mauch (German) was probably the first foreigner to reside permanently in Ajijic, beginning in 1928, when he purchased two properties on the lakeshore. According to Burton, "as of the 1930 census, taken on May 15, Alex was the only foreigner living in Ajijic" (Burton, 2022, p. 36). After a period of financial difficulties, *von Mauch* attempted to take his own life; although he received timely care, he ultimately died on November 25, 1935, in Guadalajara.

While preparing a performance at the Teatro Degollado and following a tour through several countries, in 1925 the dancers ***Zara Alexeyeva*** *("La Rusa")* and ***Holgher Alexeyev Mhenem*** settled in Chapala at *Villa Reynara*, a circumstance that would change both of their lives. According to Burton, "it was love at first sight when ***Zara*** looked at Lake Chapala: she found her home forever" (Burton, 2022, p. 25). Although many people believed both figures were indeed Russian, in reality Zara was born in Brooklyn, New York, in 1896, and her real name was Eleanore Saenger; Holger was born in Copenhagen in 1897, and his name was simply ***Holgher Mhenem***. As soon as she decided to settle in Chapala, *La Rusa* purchased some gold mines in the mountains above Ajijic, a business to which she devoted several decades of her life. For a time the couple combined their residence in Chapala with trips abroad for dance performances. Upon their permanent return, Zara decided to move from Chapala to Ajijic, where the couple settled in a lakeside house purchased in 1940 from the widow of its previous owner, ***Alex von Mauch***. There they would reside for the rest of their lives—***Mhenem*** until 1944, when he died from injuries suffered in a traffic accident, and ***Zara*** until 1989 at the age of 92. The couple—especially ***Zara***—occupy a special place in the history of Chapala and Ajijic, and in the collective memory she remains a local icon for her eccentric personality as well as her dedicated work on behalf of the lake's conservation and the welfare of Chapala's and Ajijic's residents (Burton, 2022).

Zara Alexeyeva's return to the area—settling for life in Ajijic—marks a milestone in the development of the foreign community from 1940 onward. Most importantly, Chapala ceased to be the principal focus of attraction for international travelers and expatriates from the United States and Canada (and other countries), gradually ceding that role to Ajijic, which would grow rapidly in this respect over the following decades.

Even before Zara "La Rusa" moved to Ajijic—though after von Mauch—two German-born siblings were already residing there from 1933, and by the latter half of that decade ***Paul*** and ***Liesel Heuer*** were offering lodging at one of Ajijic's first accommodations, "*Casa Heuer*." This was where *Paul Bowles* lodged during his days in Ajijic and where *Neil James*—another figure of paramount importance in the town's history—would also stay (Burton, 2022, pp. 48 ff.). A large number of famous people paraded as guests through the Heuers' house, including more celebrities of various stripes (writers, filmmakers, visual artists, intellectuals). Besides Bowles, one might mention, for example, the distinguished psychoanalyst Karen Horney, who was also a pioneer in international feminism.

Burton also highlights the move to Ajijic by the English couple ***Herbert and Georgette Johnson*** during the last month of 1939. Owners of an extensive lakeside property, they managed to create a fabulous garden that became famous along the lakeshore and beyond—indeed, even outside Mexico. Both figures were highly appreciated by the foreign community that was already taking shape and to which they contributed in important ways.

By 1937, the British writer ***Nigel Millet*** had moved to Ajijic with his father. They first lodged at *Casa Heuer* and later *at Hacienda El Tlacuache*. "Enthralled" by the latter property, Millet "persuaded its owners to rename the place '*Posada Ajijic*' and also to allow them to manage it as a true *Inn*" (Burton, 2022, p. 61). The Millets thus created an emblematic place in Ajijic that endures to this day; and Nigel Millet would also contribute as a writer to expanding the town's fame (albeit writing under a pseudonym).

When in Ajijic, Tennessee Williams stayed at the house of the American poet ***Witter Bynner***, one of Lawrence's companions during his 1923 stay in Chapala. ***Bynner*** returned years later to purchase in 1940 a house belonging to the family

of the Jaliscan architect Luis Barragán, a property restored by *Bynner's* companion ***Robert Hunt***. Burton records that both were "regular visitors to Chapala for several decades" (LakeChapalaArtists.com, 2017).

In the early 1940s there were reportedly 14 foreigners living in Ajijic and a similar number in Chapala (Burton, 2022). Particularly significant for the Chapala/Ajijic area—especially for the latter—was the arrival in 1943 of ***Neil James***, a woman who would come to play an emblematic role within the expatriate community. Her influence in Ajijic and Chapala is comparable to that of *Zara* La Rusa, though with a different personality—less eccentric, to begin with—and with broader and more lasting effects. *James* arrived in Ajijic to recover from two accidents that, curiously, occurred on two Mexican volcanoes: Popocatépetl, where she broke a leg, and Paricutín, where the roof of the shelter protecting her from the volcano's ash collapsed. As she herself quipped: "I fell on Popocatepetl; Paracutín fell on me" (Morgan, 2008). Once settled in Ajijic, James would live there for more than fifty years.

James, writes Kristina Morgan (ibid.), "was a well-educated woman who became a world-renowned author. After a brief marriage, divorced and childless, she became a brave adventurer." In particular, "her fascination with flying began after meeting Amelia Earhart." Before coming to Mexico and settling in Ajijic following her travels around the country, James had traveled through China, Russia, Finland, and Japan—experiences that inspired her books *Petticoat Vagabond: Up and Down the World*, *Petticoat Vagabond: Among the Nomads*, and Petticoat Vagabond in Ainu Land: Up and Down Eastern Asia* (Burton, 2022, p. 73).

Neil James's arrival on the Lake Chapala lakeshore—and especially in Ajijic—occurred in the mid-phase of the formation of the foreign community there; it is therefore understandable that her influence was important in the development of this community and among the local population, hence the recognition she still receives. *Neil*, Morgan adds, "believed in helping Mexicans to help themselves." In this sense, "her patronage has paid generous dividends." For more than seven decades, a steady stream of talented children have benefited from her scholarship system, which has included programs in English instruction, art education, and computer classes. James opened the first children's

bookstores and gave cooking classes to Mexican women. She helped develop a local water purification system and the installation of electricity and telephony.

During the 1940s a notable community of *artists* also began to spread along the Lake Chapala lakeshore—one that would develop over the following decades and up to the present day. Among the names recorded by Burton, we must mention ***Ernesto Butterlin***, who resided full-time in Ajijic from the beginning of the decade. In the mid-1940s Butterlin shared a house for three years with two young female artists, ***Charmin Schlossman*** and ***Sylvia Fein***, the latter a noted surrealist painter. Other visual artists in this community included ***Bette Binkley*** and ***Ann Medalie***—who had been Diego Rivera's assistant when he painted a mural in San Francisco, California—as well as ***Muriel Lytton Bernard.*** Under the auspices of ***Irma Jonas*** and the enthusiastic participation of Ernesto Butterlin, "The Mexican Art Workshop" was held in Ajijic in 1947, 1948, and 1949—an event that consolidated the creative vocation of many members of the expatriate community in Chapala and Ajijic and projected it into the future (Burton, 2022, pp. 87–91).

By the end of the 1940s, the influx of expatriates to Guadalajara and especially to Chapala and Ajijic increased rapidly, among them several veterans of the Second World War together with their partners or families (Burton, 2022, p. 42). They would be joined by veterans of the Korean War during the latter half of the 1950s (Hunt, 2001) and veterans of the Vietnam War from the mid-1970s onward. It should be said, however, that both at that time and in the following decades, immigration to the lakeshore would consist mainly of retirees and pensioners, the great majority from the United States and Canada. The foreign community grew in number and importance along the lakeshore—in Chapala, naturally, but even more in Ajijic.

Among the diverse names recorded by Burton are the Englishmen ***Arnold Eiloart*** and ***Peter Elstob*** (who lived in Ajijic between 1949 and 1952, founded the promoter Peter Arnold S.A., and managed the *Posada Ajijic* hotel). In 1951 the American ***Bob Thayer*** arrived in Ajijic as the "next" manager of the Posada Ajijic, which he "modernized" and significantly altered. Others were figures linked to film or television. Among these Burton mentions ***Lorenzo Semple Jr***. (lived in Ajijic in the 1950s), ***Sherman Harris*** (resided in the 1960s), and ***Ale-***

jandro Grattan-Domínguez, who arrived in Ajijic in 1987 and in 1988 "*founded the active Ajijic Writers' Group.*" ***Helen Kirtland*** also arrived in the mid-1940s, acquiring and making internationally famous the "Ajijic Hand Looms," a business she would later sell in 1973.

We have already seen that from her move to Ajijic onward, *Neil James* played an important role in business, social, philanthropic, and environmental activities. Under her leadership, however, another event of great significance also took place within the expatriate community from that time to the present. In January 1955 James and some thirty expatriates founded ***The American Society***, created for "charitable, social, and cultural" purposes. The following month the name was changed to ***The Chapala Society*** and its headquarters were set up in a house located in Chapala, the municipal seat. Nine years later, in 1964, the name was modified again to the designation that endures today: ***The Lake Chapala Society*** (Burton, 2022, p. 138 ff.).

For almost a decade the majority of the Society's membership resided in Chapala, a situation that had changed by 1978, when the proportion of residents in Ajijic had become the majority. This "led to relocating its administrative offices" to Ajijic in 1983 (Burton, 2022). The new headquarters were installed on part of Neil James's property in Ajijic, which she first lent for a period of five years. In 1989 James would donate the entire property to the ***Lake Chapala Society***, in exchange for the Society's attending to "all of James's future daily needs and providing her all the support required to live in the house." Founded by 21 people in 1955, by 1971 it already had 550 members, 1,000 in 1979 (Burton, 2022, pp. 140–141), and up to 4,000 in 2005 (Morgan, 2008). Today it is estimated that the Society has more than six thousand members.

The creation of the *Lake Society* was a clear sign that during the 1950s the formation of the expatriate community in Chapala and Ajijic entered an accelerated dynamic of growth and consolidation while achieving greater international visibility.

Evidence of this were the features noted by Burton in ***Esquire*** and ***Time***. In particular, in its issue of December 23, 1957, the influential *Life Magazine* ran an article that included the section "Americans Abroad: Chapala, Mexico," which already discussed this community. The article's title is more than suggestive:

"Yanks Who Don't Go Home: Expatriates Settle Down to Live and Loaf in Mexico" (pp. 159 ff.). According to *Life Magazine*, by that time about 500 Americans were living in Chapala and Ajijic, forming a community composed of two "strata: an elite of elders who have retired to enjoy their savings," on the one hand, and a "clique of artists and oddballs," on the other. According to the article, the former "had a country club and a nine-hole golf course" in Chapala, while the latter, "the bohemians," had "an art gallery and a bar in Ajijic" (p. 159).

The characterization is interesting because the growth of the expatriate community on the Lake Chapala lakeshore also implied increasing heterogeneity, albeit in a predominant direction that remains today. Retirement migration became predominant, but there was also an influx of figures embodying the cultural changes of the era. The group of expatriates with somewhat more conventional lifestyles grew more than others—though it had always included writers (Neil James), poets, visual artists, academics, and people connected to theater, dance (Zara, La Rusa), or film. By the late 1950s and during the 1960s, however, expressions of alternative cultural currents made their presence felt in Chapala and Ajijic. First came visitors and residents linked to the Beat movement and later those associated with the Hippie movement.

Among the latter, Burton gives a special place to residents with intellectual ties to the Beat writers and artists who made Ajijic and Chapala a destination for temporary visits or residence—at least for a few years from the late 1950s into the 1960s, with some staying permanently. We have already mentioned the three principal figures of the *Beat* movement (Ginsberg, Kerouac, and Burroughs) who at some point passed through Ajijic on their travels in Mexico. Among other names who resided there, Burton notes the folk singer ***Lori Fair*** and her partner, the painter ***Don Martin***—both related to the Beat Generation—who settled in Ajijic in 1954. *Martin* remained until 1961, while *Fair* moved a few years earlier to Mexico City. The prominent sociologist ***Ned Polsky***, also linked to this generation and author of the well-known book *Hustlers, Beats, and Others*, lived for a time in Ajijic in the "late 1950s."

The African American artist ***Arthur Monroe***—"part of the abstract expressionist movement and the *Beat* scene in California"—lived three years in Ajijic at the dawn of the 1960s. ***Al Young***, another African American poet, during his

stay in Ajijic in the latter half of the 1960s, gathered material for two of his works—a poem ("Moon Watching by Lake Chapala") and a novel ("Who Is Angelina")—and established lasting bonds of friendship with Monroe. Also between 1950 and 1960 another Beat poet, ***Jack Gilbert***, lived in the "Gold Mill House," rented from Zara Alexeyeva, "while he worked on his poem *Views of Jeopardy*, a work nominated for the Pulitzer Prize in Poetry in 1960 (Burton, 2022, pp. 162–163).

It is interesting to note that Tony Burton does not avoid a compulsory topic regarding the *Beat* movement and subsequently the *Hippie* movement, which also made itself felt in Chapala and Ajijic—namely, drug use, especially marijuana. ***Willard Marsh's*** novel "captures the atmosphere" of that time on the Lake Chapala lakeshore. With some interruptions, from 1952 until his death in 1970, *Marsh* resided in Ajijic, where he was ultimately buried (Burton, 2022, p. 171).

We have already mentioned that *Norman Mailer*, another major American writer and two-time Pulitzer Prize winner, is said to have visited Ajijic occasionally, finally staying for several months at the end of the 1950s and early 1960s. Burton records a scandalous incident at that time that involved marijuana use together with the sexual conduct of Mailer and his then wife (Burton, 2022, pp. 62–63; LakeChapalaArtists.com, 2018). The incident is relevant insofar as drug use first grew within the "bohemian" sector—largely visitors identified with the lifestyle of the Hippie movement (Burton, 2022, pp. 167–174)—which, in turn, increased markedly; yet it also spread among those who decided to make Chapala and Ajijic a place of permanent residence. In the 1960s Chapala and Ajijic were particularly attractive to many figures of the Counterculture and of the Hippie movement. The peculiar aesthetics and behaviors of some of these figures occasionally caused friction with the local community.

Regarding drugs, ***Thad Ashby***, a "messianic type" from Timothy Leary's team, along with "his followers," arrived in Ajijic in 1963 to conduct experiments with LSD (lysergic acid). Among the participants in these experiments, Burton highlights ***Beverly Johnson***, a woman who also stands out in the history of the expatriate community in Chapala–Ajijic (Burton, 2022, p. 169).

Those experiments, adds Burton, were of short duration, as was the open display of the exuberance and eccentricities of many *Hippies* present in Chapala and Ajijic in the mid-to-late 1960s. In fact, many of the expatriates who lived on the lakeshore did not stop seeing them as "weirdos wandering around" (Burton, 2022, p. 169). For this reason the Hippie movement waned at the end of the 1960s; the "bohemian" sector of the expatriate community, however, would remain—standing out for the breadth of its artistic and cultural activities, and not predominantly for the eccentricities of its lifestyle.

Beverly Johnson, with her five small children, settled in Ajijic around 1961 from Oregon (USA) and remained on the Lake Chapala lakeshore for the rest of her life. She was another outstanding figure of the foreign community, by then composed mostly of Americans and Canadians. According to Burton, *Johnson* became a lively reference point in Ajijic; "one of the very unconventional characters who added spice and excitement to the town's daily life" (Burton, 2022, p. 175). According to one of her daughters, cited by Burton, *Johnson* "was crazy and amazing, and life with her was like riding a roller coaster" … "she used her many creative talents as a poet, singer, writer, chef, painter, photographer… to get by in her life and that of her children" (Burton, 2022). After fifteen years in Ajijic, Beverly Johnson died in December 1976 of a heart attack.

In 1962, ***Iona Kupic***, a former teacher from New Orleans, arrived in Ajijic after "completing a two-year trip around the world" (Burton, 2022, p. 179). Like other foreigners, Kupic decided to settle in the town for life, in a house rented from Zara "La Rusa," with whom she cultivated a deep and lasting friendship. Like Zara, according to Burton, *Kupic* had "an effervescent, colorful, eccentric, and generous personality" and favored extravagant attire, so seeing her walk through town "was like watching a vaudeville girl performing on stage" (Burton, 2022, p. 192). In addition to promoting education and culture, *Kupic's* philanthropic activities were outstanding. She soon became an influential figure among the expatriate community and was also recognized by the local population.

While they shared their lives there for many years, *Kupic*, *Zara*, and *Neil James* were the "triumvirate of great ladies" in Ajijic, who contributed greatly to the welfare of the local population thanks to their philanthropic, social, environ-

mental, and cultural activism. *Kupic* died in 1999, after *Zara Alexeyeva* and *Neil James*, whose deaths occurred in 1989 and 1994, respectively.

In general, important personalities of the arts and culture—many of international renown—have passed through Chapala, Ajijic, and nearby towns. Thanks to this, the expatriate community has been nourished by many immigrants who share these same intellectual concerns, forming a community that is, to begin with, diverse, culturally rich, active, and varied. This process was accompanied by a change in the demographic characteristics of expatriates and thus in their reasons for visiting or residing in Chapala and Ajijic.

The average age became progressively higher as the number of retired expatriates increased. Consequently, motivations like those that drew *Hippies* to the destination lost weight over time—though perhaps not the bohemian style of the *Beatnicks*. Even so, the expatriate population—made up largely of *Baby Boomers*—lived through, or at least witnessed, the social and cultural dynamics of the 1950s, 1960s, and, of course, the 1970s; thus, one can say that it bears the sensibilities and at least part of the mentality expressed in those dynamics and inherited by subsequent generations.

All of this is reflected in the lifestyles and especially in the sociocultural and political identity that, as we shall see in subsequent chapters, predominates among the foreign community currently living on the Lake Chapala lakeshore. In any case, the expatriate community in Chapala and Ajijic evolved into a population characterized by a very high level of education and a plurality of social and cultural interests. It is an intellectually motivated community, with a strong interest in artistic and cultural activities, highly interested and well informed regarding political affairs, and marked by a generously cultivated philanthropic vocation. In the end, we see the formation of a community with a distinctive liberal, progressive, and left-leaning mindset, where identification with the Democratic Party—among Americans—and with the Liberal Party and the New Democratic Party—among Canadians—is predominant.

This community is estimated to have grown to nearly 18,000 people, of whom about 13,000 would be *permanent residents* and the remaining 5,000 *seasonal residents or snowbirds.*

CHAPTER 2.
Puerto Vallarta / Bahía de Banderas

The foreign community of Puerto Vallarta has a different history from that of Ajijic/Chapala—which, of course, is understandable. When Chapala was beginning its takeoff as a tourist, vacation, and entertainment destination—both nationally and internationally—and was already being promoted in early travel books by figures such as *Mathieu de Fossey* (1857) and *William Henry Bullock* (1864), Puerto Vallarta was only just being founded in 1851 by a small number of families led by Don Guadalupe Sánchez, in a coastal settlement almost completely isolated from the world. At that time *Puerto Las Peñas* did not even reach 100 inhabitants. Moreover, whereas tourism was already shaping up as Chapala's main economic activity, Puerto Vallarta would be driven first by the mining boom in the second half of the 19th century and the early 20th, and later by export-oriented agriculture between 1925 and 1935.

For that reason, the first foreigners who came to reside in Chapala were travelers with a literary bent, authors of international guidebooks, eccentric personalities, or entrepreneurs linked to tourism. I will mention only those pioneers who made Chapala their place of residence. One was *Mr. Duncan Cameron*, owner of the famous steamship "Libertad", which connected Chapala with the other lakeside towns. Another was *Septimus Crowe*, a "peculiar English gentleman" who had served as vice-consul in Kåfjord, in northern Norway, and was drawn by the sulfurous waters and the beauty of the lake. And, as noted earlier, the Spanish "peninsular" *Ignacio Arzapalo Palacios* was a pioneer in the region's hotel industry.

Mining and Agriculture Personalities

Nonetheless, there is evidence of foreign presence in Bahía de Banderas and, in some cases, in the small village that would become Puerto Las Peñas and later Puerto Vallarta. Carlos Munguía records several such events (1996), some quite distant in time.

We must begin, naturally, with ***Francisco Cortés de Buenaventura*** (nephew of Hernán Cortés), who is said to have conquered the Valle de Banderas (Tintoque) in a battle against the local Indigenous peoples, who along with their weapons carried small banners "of plumage in various colors," to which the Spaniards added four standards. From this, according to the account by Father ***Antonio Tello***, derives the name "Bahía de Banderas," Bay of Flags (Munguía, 1996, p. 12).

Since then, according to Munguía Fregoso, Spanish sailors passed through the bay in search of cabotage ports, as did corsairs and pirates such as the Englishman ***Thomas Cavendish*** (around 1587). The same year also records the presence of the Spaniard ***Pedro de Unamuno***. In the following century, the Spaniard ***Bernardo Bernal de Piñadero*** is said to have been in Mismaloya to build "two ships intended for the exploration of the Californias." In 1685 the Englishmen ***Swan*** and ***Townley*** are mentioned as having landed in the bay in search of provisions but were attacked by "a group of Spanish soldiers." Munguía adds more names: for example, "from the 18th century onward, and during the first half of the 19th, English and French smugglers arrived in Banderas to sell their goods to the inhabitants of the valley and Compostela. One of them, the Englishman ***John Clipperton***, was captured by the Spaniard ***Luis de Santos*** in 1714, along with a war frigate and a large-tonnage ship that he had brought from Peru" (Munguía, 1996, pp. 13–15).

Alongside the names of conquistadors and Spanish sailors, and English pirates, corsairs, and smugglers, Munguía mentions another important group of foreigners: North Americans who sailed in vessels dedicated to hunting humpback whales, animals that migrate every winter to Bahía de Banderas.

According to another account cited by Munguía, "two whalers from Boston anchored near Boca de Tomates in 1797. The Americans, sick and exhausted after thirteen months at sea, gladly received the food, fruit, and two cows provi-

ded by Don Manuel González Villalaz, justice lieutenant of Valle de Banderas. A week later the sailing ships departed during the night, and the reason for their sudden flight was never known" (1996, p. 15).

Munguía also records the arrival in 1861 of another whaling ship, likewise anchored at Boca de Tomates. It was the whaler *Florida*, "under Captain ***Thomas Williams***," accompanied by his wife "Elisa" and the corresponding crew. This vessel "had sailed from New Bedford, Massachusetts, in September 1858." A curious detail is the birth of the daughter of Elisa and Captain Williams—"probably" the first U.S. American born in the area—whom they named Mary Walkins Williams (1996, pp. 45–46).

It was not until almost a year before the end of the 19th century (1899) that another foreigner, important for local history and engaged in very different pursuits from those of the first travelers to Chapala, made his appearance. Around that time the American ***Alfred W. Geist*** purchased from the Jaliscan Jesús Camarena 90% of the shares of the mining company "Unión en Cuale" and thereby acquired control over mining production and more than 20,000 hectares of land extending "from the Cuale mines to where the Rancho Las Peñas stood" (Gobierno Municipal de Puerto Vallarta). These mining operations gave Puerto Las Peñas its first notable configuration, altering its demographic and economic profile and establishing initial links with the national and international silver markets. An important indicator is that, from 100 inhabitants in 1851, Puerto Las Peñas grew to more than 800 by 1885 thanks to in-migrants from neighboring municipalities (San Sebastián del Oeste, Atenguillo, Mascota). The mining boom lasted until the early 1910s, when "the drop in the price of silver, due to the discovery of new veins in the United States," favored producers of lower-quality silver there. Agriculture then became the more important activity (Transparencia Puerto Vallarta, n.d.).

And it was in that direction that the port's next boom would unfold, which since 1918 had been elevated to the status of municipality, now under the name Puerto Vallarta. This new cycle of economic development—with far-reaching social and cultural repercussions—would be bound to the name of another memorable foreigner: ***Joseph W. Montgomery***, or, more colloquially, ***La Montgomery***—the Montgomery & Co. Mercantile Society, based in Louisiana, U.S.A.

The cycle begins in 1923, when *Joseph W. Montgomery* acquired 28,391 hectares distributed among the localities of Ixtapa, Las Palmas, El Colesio, and half of Coapinole-Pitillal (Sabido, 2023). Part of this land reserve corresponded to the Hacienda Ixtapa, owned by another foreigner, ***Albert Beach***, who sold it to *la-Montgomery*. The company established large plantations of Roatán bananas, mainly for export to the southern United States. The administrative buildings and workers' housing were built in Ixtapa, where some houses and warehouses—constructed of wood and in the architectural style of the neighboring country—still remain.

La Montgomery—perhaps even more than its owner—left a deep imprint on the economic, social, and cultural life of Ixtapa and thus Puerto Vallarta. The presence of foreign staff working there led to the diffusion among the local population of expressions of North American lifestyle and culture (film, music, and the performing arts). However, the prosperity inaugurated by La Montgomery closed relatively soon, in 1935, when the company ceased operations as a result of agrarian reform initiated by the federal government in those years. For the rest of that decade and the first half of the 1940s, the port's economy remained primarily export-oriented but now relied on fishing (among other species) and especially shark fishing.

From the early 1940s—and especially after the end of World War II—domestic tourism and nascent foreign tourism turned Puerto Vallarta into an attractive destination of increasing renown both nationally and internationally (Munguía, 1996, p. 21). By 1942 Puerto Vallarta was already being promoted in the United States. In a special issue of the *U.S. Chamber of Commerce Magazine* devoted to "Modern Mexico," "among the tourism ads there was one inviting travel to Puerto Vallarta" (Scartascini, 2011, p. 77).

By the end of that decade, some foreign tourists decided to make Puerto Vallarta their permanent home, captivated by its paradisiacal setting of sea, jungle, and mountains; the urban landscape of a typical Mexican highland town; and the simplicity and warmth of its inhabitants. As in Chapala and Ajijic, foreign immigration began with a few individuals and then accelerated considerably in the 1950s and even more so in the 1960s and subsequent decades.

Celebrities Who Passed Through Puerto Vallarta

As in Chapala and Ajijic, celebrities of various stature and international fame have passed through Puerto Vallarta, figures who bestowed prestige and renown on the town as a tourist destination and an important, welcoming place of residence. At the time, each celebrity helped certify the natural, social, and cultural marvels of Puerto Vallarta—that is, each of the features that earned it a reputation as a true, pristine paradise.

This time we cannot produce as precise a roster of visiting figures, because there is no work on Puerto Vallarta comparable to what Tony Burton has done for Chapala and Ajijic. We must rely on records that are inexact and incomplete. Nevertheless, those available suffice to mention important names and to gauge the scale of Puerto Vallarta's appeal for foreigners—both tourists and expatriates.

The first thing to be said is that Puerto Vallarta became known internationally during the second half of the 1940s, when travel guides and chronicles lost ground as primary sources of dissemination and information—sources that had greatly benefited Chapala—giving way to the printed press, radio, film, and the incipient spread of television at the end of the same decade, all of which benefited Puerto Vallarta.

At the beginning of the 1950s, Puerto Vallarta was already an attractive destination not only for Mexicans but for many international tourists. It also became a special destination for expatriates who made it their permanent home, in numbers that would grow exponentially within a few years. One indicator is that by 1952, when ***Fernando "Freddie" Romero*** built the *Bungalows Las Campanas*, he inaugurated the construction of a series of houses in what had already come to be known as *Gringo Gulch*. Romero would soon become, together with Guillermo Wulff, the principal builder of houses famous for their architecture in this and other parts of Puerto Vallarta.

Clearly, visits by prominent personalities from the world of culture and the media—especially film—helped project Puerto Vallarta internationally. The parade of personalities began in the late 1950s and early 1960s. One example was the American actor ***Rock Hudson***, who, invited by Xavier de la Torre—an iconic Vallarta figure—visited the destination in the spring of 1963, a "hinge" year

for the town (Cortés, 2021, p. 105). Rock Hudson, writes Sergio Toledano, "was one of the first to visit Xavier and would return repeatedly" (2021, p. 1).

According to Toledano, De la Torre was in part the epicenter of a community of "intellectuals, artists, and entrepreneurs who came and went from California, New York, or Europe with increasing frequency. Among many others, we might recall the prima ballerina ***Janet Sassoon***; actors ***Burt Lancaster*** and ***Peter O'Toole***; Dolores del Río; Italian sculptor ***Zev***; singer Lola Beltrán; jazz artist ***Carmen McRae***; and graphic designer "***Bill Chappell***" (Toledano, 2021).

The year 1963 was particularly prolific for the arrival in Puerto Vallarta of Hollywood figures—actors, actresses, photographers, technicians—as well as well-known journalists from Mexico, Europe, and North America. The reason, of course, was the shooting of "*The Night of the Iguana*", a film based on a play by **Tennessee Williams**, which greatly expanded and deepened Puerto Vallarta's fame and international profile. From then on, many famous figures would choose to vacation there one or more times, while others decided to purchase homes in the city, initiating a migratory wave of large proportions.

It is worth mentioning the names of the principal members of the *Cast* and *Crew* who accompanied director ***John Huston*** on the adventure of filming the movie in conditions as difficult as they were stimulating in Mismaloya—that is, in an uninhabited place where, before filming began, there was nothing but tropical vegetation, beach, and sea, alongside a great diversity of wildlife.

Most of those involved in the shoot were in Puerto Vallarta from September to December 1963, except for the "Gringo Gulch Girls," who appeared as extras and were already residents. It is not known exactly how many, or which of them, returned, but what was extraordinary is that the film's three principal stars made Puerto Vallarta their occasional or permanent home. In any case, all of them likely served as spokespeople—somewhat like the travel chroniclers in Chapala—for Puerto Vallarta's natural and cultural attractions. Tourism surged thereafter, as did the number of people who came to settle in the port.

From the team that accompanied *John Huston* in Puerto Vallarta we may mention the following: first and foremost ***Ray Stark***, executive of "Seven Arts Corporation" and producer of "The Night of the Iguana"; ***Sandy Whitelaw***, associate producer; ***Benjamin Frankel***, composer and conductor; "***Ralph Kem-***

plen", editing and montage; "***Stephen B. Grimes***", art director (nominated for an Oscar for the design of the film's main set); ***Dorothy Jeakins***, also Oscar-nominated for costume design; ***Agnes Flanagan*** and ***Sydney Guilaroff***, hair and styling; ***Eric Allwright*** and ***Jack Obringer***, makeup; ***Clarence Eurist***, production manager; ***Abe Steinberg***, production supervisor; ***Tom Shaw***, assistant director; ***Jamie Contreras*** and ***Terry Morse Jr***., second assistant directors; ***Basil Fenton-Smith*** and ***Van Allen James***, sound and sound editor respectively; and ***Manuel González***, cameraman, among others (Cortés, 2021).

Obviously, the greatest global public impact came from the film stars who were in Puerto Vallarta to participate in the shoot—save one, the most famous of them all. The Welshman ***Richard Burton*** headed the cast and was one of the three most important figures in terms of the fame they brought to the city. At the time, Burton was considered one of the best actors in the world; in *The Night of the Iguana* he plays the Reverend Lawrence T. Shannon, a priest defrocked by his church.

He was joined by three equally renowned actresses. ***Ava Gardner***—of great beauty, temperamental, but a fine performer—received several Oscar nominations and in 1964 won Best Actress at the San Sebastián International Film Festival (Spain), precisely for her performance as Maxine Faulk in *The Night of the Iguana*. Her romantic adventures in Puerto Vallarta during the shoot became legendary.

Deborah Kerr, another great British actress whose talents earned the admiration and respect of *John Huston*, had six Oscar nominations—among the most of any actress. In the film she played Hannah Jelkes. Kerr also wrote about her experiences filming in Puerto Vallarta, leaving a sympathetic and valuable portrait of life in the town in 1963.

Sue Lyon, playing Charlotte Goodall, was the youngest member of the cast (20 years old) and carried the international fame that came from her role as Lolita in Stanley Kubrick's film of the same name.

Rounding out the cast were ***Grayson Hall***—who also captured an Oscar nomination for her role as Judith Fellowes in *The Night of the Iguana*; ***James Ward*** as Hank Prosner, ***Cyril Delevanti*** as Nonno, ***C.G. Kim*** as Chang, and the group of schoolteachers portrayed by ***Gladis Hill*** as Miss Dexter, ***Billie Matticks*** as

Miss Throxton, and **_Thelda Victor_**, ***Eloise Hardt, Barbara Joyce, Betty Proctor, Liz Rubey, Bernice Starr,*** and ***Dorothy Vance*** (Johns, 2017).

We must, of course, make special mention of ***John Huston***, the film's director, and ***Tennessee Williams***, the playwright on whose work the story was based. We will return to Huston below; for now, a word about Williams. The famous writer was present in Puerto Vallarta for nearly the entire duration of the shoot, making adjustments to the screenplay until a disagreement with Huston over the film's ending led him to leave before filming was completed (Johns, 2017).

But the strongest magnet drawing global curiosity to Puerto Vallarta was not a member of the film's cast. ***Elizabeth Taylor*** was the focus of worldwide attention for several reasons: she was one of the era's most beautiful actresses; she was also the highest-paid film actress in history; and she was accompanying *Richard Burton*, with whom she had begun an affair—despite both still being married—during the filming of the super-production "Cleopatra".

Finally, we must mention the large group of journalists and reporters who traveled to Puerto Vallarta to record the vicissitudes of the shoot, hoping for a scandal on the scale of the "illicit" romance between *Burton* and *Taylor* or another romantic episode of similar global impact. The presence of the world press was, obviously, crucial to the international projection of this fishing village, surrounded by natural wonders, which was already becoming a privileged tourist destination. They did the work that travel writers and chroniclers had previously done—over decades—for Chapala.

Johns estimates around "150 reporters and journalists from various countries, among whom were personalities famous in their own right" (2017, p. 316). A few names suffice to illustrate this.

Hedda Hopper, a former actress and then columnist for the *Los Angeles Times*, the Chicago Tribune, and a dozen other papers, was famous for the asperity of her reporting and for being a tough interviewer, as well as for her political conservatism. Her interviews with *John Huston* about "The Night of the Iguana" were traps the director skillfully sidestepped. The scale of her fame even led to her being portrayed in a film about the life of writer Dalton Trumbo, played by the extraordinary British actress Helen Mirren.

Helen Lawrenson was a notable U.S. journalist and socialite who published one of the most authoritative reports on the shoot under the title "The Nightmare of the Iguana." She, too, could be brutally candid in her depictions of Hollywood actors and actresses, as in that article.

Dorothy Kilgallen—a radio and TV host but primarily a journalist—had a long-running column, "The Voice of Broadway," in *William Randolph Hearst's* New York Journal-American. Like Hopper and *Lawrenson, Kilgallen* was sharp and controversial.

Sheila Graham became famous for her column "Hollywood Today," which she wrote daily for 35 years. She was also well-known for her romance with the celebrated writer . *Scott Fitzgerald*, and as a columnist she was pointed and aggressive, becoming the declared rival of *Hedda Hopper.*

Photographer ***Pete Turner***, who worked for "*Esquire"* and "*Look Magazine"* during the filming of The Night of the Iguana, already enjoyed a reputation as one of the finest photographers of his generation (born in 1934). He is renowned for his mastery of color photography (Dye, 2017).

Bob Thomas, a journalist with the Associated Press since 1944, "was an admired—and feared—chronicler of the biggest stars. Intelligent and ironic, he always kept in mind a golden rule of journalism: do not become a friend or flatterer of the people you interview." He also wrote biographies of great Hollywood figures such as Joan Crawford, Marlon Brando, Bob Hope, Bing Crosby, and Walt Disney (Mojica, 2024).

Harrison Carroll, who for 47 continuous years covered Hollywood life and its protagonists—always for the *Los Angeles Herald-Express*—was a careful reporter and a highly respected figure in the industry.

Florebel Muir was another U.S. journalist who first covered crime news and later moved to Los Angeles to report on Hollywood for the *Daily News*. Muir took over the *"Hollywood News"* column after *Hedda Hopper's* death in 1966, which speaks to the quality of her work.

Marilyn Beck was another major Hollywood journalist whose syndicated column appeared in more than 500 newspapers (according to the Los Angeles Times). Among the accounts of the filming, hers—titled *"Strictly Elizabeth and*

Richard"—focused on recording the presence of Elizabeth Taylor and Richard Burton in Puerto Vallarta (Cortés, 2021, p. 139).

Herb Caen—a distinguished journalist from the United States based in San Francisco, California—was famous for his column "*It's News to Me,"* published in the *San Francisco Chronicle* over several decades. Caen "liked to play with language: he coined the word *Beatnik* and popularized the concept *Hippie*." In 1996 he was awarded a Special Pulitzer Prize for the cultural importance of his voluminous journalistic work (Strangedejim, n.d.).

Gjon Mili, a prominent photographer originally from Albania, developed his professional life in the United States. "An amateur oboist, Mili cultivated a genuine appreciation for the performing arts and over the years produced exquisite photos of dancers, musicians, and actors," almost all for "*Life Magazine*" (Life Magazine, 1957).

Richard Lee Strout was also a "gifted and influential columnist who published from Washington for six decades" (May, 1990). Strout wrote his column for "*The Christian Science Monitor*" until his retirement in 1984 and received the *George Polk Memorial Award* for national reporting in 1958 and a Special *Pulitzer Prize* in 1978.

Charles Collingwood, another American journalist, worked for CBS News from 1941 after covering World War II for *United Press* up to that date. He covered major events such as the war in Southeast Asia and the assassination of John F. Kennedy.

Other journalists who came to Puerto Vallarta and are mentioned by Howard Johns (2017) include ***John Alius***, head of the United Press office for Mexico, Central, and South America at the time of filming; ***Richard Oulahan***, of Life Magazine; ***Stan Hoffman***, of the *Philadelphia Daily News; ***Stephen Birmingham***, of Cosmopolitan; ***Aline Mosby***, of United Press; ***Peter Evans***, who wrote for the Los Angeles Times, The New York Times, and the Daily Express; TV host ***Ernie Anderson***; Jimmy Starr, of the Los Angeles Herald-Express; ***Sidney Skolsky***, of the Hollywood Citizen-News; ***Lowell Redelings***, of the Los Angeles Evening News; photographer ***William Lovelace***, for the Daily Express; ***Jerry Hulse***, of the Chicago Tribune; ***Morris Rosenberg***, of Associated Press; actor and journalist ***James Bacon***, of Showbiz; ***Roderick Mann***, also of Showbiz;

Paul Kennedy, of The New York Times; and ***Jack Smith***, of the Los Angeles Times.

All the reporters and columnists who covered the filming did in three months what had taken travel writers and chroniclers decades to achieve for Chapala: Puerto Vallarta's international publicity.

If "The Night of the Iguana" summoned all these film and journalism celebrities in 1963, the magnetism did not end with the film's completion. On the contrary, it made Puerto Vallarta a substitute for Acapulco in attracting international tourism and a host of figures from cultural and artistic life worldwide, especially from the United States and Canada. Many more famous names continued arriving at least through the 1980s and 1990s. Although to a lesser degree, the area still retains this draw, even if since the mid-1990s the Nayarit side of Bahía de Banderas—Nuevo Vallarta and Punta de Mita, for example—has gained prominence.

Puerto Vallarta's natural and scenic attractions continued to draw international film productions until recent years, so the presence of actors, actresses, directors, and film crews was fairly constant. Up to 2019, nearly fifty films had been shot in Puerto Vallarta, of which 34 (68%) were foreign productions, mainly from Hollywood (Cortés, 2021). Below we list the directors and some leads of all these films, who of course traveled to Puerto Vallarta to carry out their work.

It is not hard to suppose that many Hollywood celebrities—or film figures from other countries—came to Puerto Vallarta during the 1960s from the start of 1964 through the end of the decade. However, specific names beyond those already given for The Night of the Iguana are not documented. That is not the case for the following decade, the 1970s, which began with the visit of U.S. President ***Richard Nixon*** to Puerto Vallarta, where he met with his Mexican counterpart *Gustavo Díaz Ordaz* to discuss several bilateral issues: the salinity of the Colorado River; the return of the Chamizal zone to Mexico; delimitation of the border at the Ojinaga crossing; migration; and the signing of an agreement related to the fight against drug trafficking (Cortés, 2021, p. 164).

In 1973 the second foreign film was shot in Puerto Vallarta, this time a Franco-Italian production. *Le Magnifique* brought to Puerto Vallarta one of the finest actors of the 20th century, ***Jean-Paul Belmondo***, and the young and beautiful

actress ***Jacqueline Bisset***. The film was directed by the Frenchman ***Philippe de Broca***.

Two years later, in 1975, ***Peter O'Toole*** traveled to Puerto Vallarta to star in *Man Friday*—one of his frequent visits to the city, where he often met up with Richard Burton, a close friend and companion in the art of imbibing spirits. Co-stars in Man Friday were ***Peter Cellier*** and ***Christopher Cabot***, and the director was ***Jack Gold***.

In 1977 the distinguished actors ***Gene Hackman***, ***Richard Widmark***, and ***Mickey Rooney***, together with another extraordinary actress, ***Candice Bergen***, filmed *The Domino Principle* in Puerto Vallarta. The movie was directed by the prestigious ***Stanley Kramer***. Clearly, international interest in Puerto Vallarta as a location for film shoots remained high, even though only three foreign films were shot that decade—six in total if we include the three domestic productions.

The arrival of film stars and personalities continued to project Puerto Vallarta's image, as nine films were shot in the 1980s, seven of them international (though not all of equal quality).

Right at the start of the decade came the principal cast and crew of *Herbie Goes Bananas*, including director ***Vincent McEveety*** and actors ***Charles Martin Smith, Stephen D. Burns***, ***Cloris Leachman*** (Oscar and Golden Globe winner), and ***Julie Vernon***.

That same year, 1980, two more films were shot in Puerto Vallarta. The first, a comedy, *Caveman*, brought ex-Beatle ***Ringo Starr*** to Vallarta, alongside ***Dennis Quaid*** and ***Shelley Long*** in the leads, under the direction of ***Carl Gottlieb***. The second was a war drama, *A Rumor of War*, starring ***Keith Carradine, Brad Davis, Brian Dennehy,*** and ***Michael O'Keefe***. Both films brought more film personalities to Puerto Vallarta, as can be seen.

Another special year was 1983, practically at its very beginning. On February 23, Puerto Vallarta was honored by a visit from ***Queen Elizabeth II of England***—the second head of state after *Richard Nixon* to visit the city. The Queen's presence was a powerful testimony to Puerto Vallarta's international prestige.

Also, in 1983 came the Canadian production *Dead Wrong*, directed by ***Leo Kowalewich*** and starring ***Britt Ekland, Winston Rekert,*** and ***Jackson Davies***.

Three years later, in 1986, ***Firewalker***, by ***J. Lee Thompson***, was filmed with ***Chuck Norris, Louis Gossett Jr., Melody Anderson,*** and ***Will Sampson***. That same year the B-movie *Separate Vacations* was shot, directed by ***Michael Anderson*** and starring ***David Naughton***, ***Jennifer Dale, Mark Keyloun, and Lally Cadeau.***

In terms of major productions, 1987 stands out for *Predator*, directed by the American ***John McTiernan***, which featured ***Arnold Schwarzenegger***, ***Carl Weathers***, ***Jesse Ventura***, ***Kevin Peter Hall***, and Mexican actress ***Elpidia Carrillo***. Schwarzenegger continued to visit Puerto Vallarta, where he opened a *Planet Hollywood* restaurant franchise in co-ownership with fellow Hollywood stars (such as *Sylvester Stallone*).

That same year another smaller film, *Down Twisted*, was shot in Puerto Vallarta, directed by ***Albert Pyun*** and starring ***Carey Lowell***, ***Charles Rocket, Trudy Dochterman,*** *and* ***Thom Matthews***.

The following decade was even more fertile for Puerto Vallarta: **12 foreign films** (plus 4 Mexican) were shot in the 1990s—the largest number of international shoots in the city's history—implying, of course, the presence of the largest number of directors, actors, actresses, and crews. In terms of the prestige of the participants, the most relevant foreign film was shot right at the beginning of the decade, in 1990: *Revenge*, directed by the famed ***Tony Scott*** and starring ***Kevin Costner, Anthony Quinn, Madeleine Stowe,*** and ***Tomas Milian***. Incidentally, this was not *Costner's* first time in Puerto Vallarta; he had honeymooned there in 1978, before his film career.

In 1992 another film was shot—*The Harvest*, directed by ***David Marconi***—with ***Miguel Ferrer, Leilani Sarelle, Henry Silva,*** and ***Tony Denison*** in the leads. The following year, 1993, saw three films in succession: *Gunmen, Blind Side, and The Cover Girl Murders*, directed respectively by ***Deran Sarafian, Geoff Murphy, and James A. Contner***. The first starred ***Christopher Lambert, Mario Van Peebles, Denis Leary,*** and ***Patrick Stewart***; the second ***Rutger Hauer, Rebecca De Mornay, Ron Silver, and Jonathan Banks***; and the third ***Lee Majors, Jennifer O'Neill, Adrian Paul, and Beverly Johnson.***

Born Wild movie was filmed in 1995, directed by ***Philippe Blot*** and starring ***Jennifer Barker, Dan Spector, *Daniel Dupon,*** and ***Nike Kirton.*** In 1996 two

films were shot the same year: *Solo and Overkill*, directed respectively by ***Norberto Barba*** and ***Dean Raphael Ferrandini***. Performances in the first included ***Mario Van Peebles, William Sadler, Barry Corbin, and Jaime Gómez; in the second Michael Nouri, Aaron Norris,*** and ***Kenneth Moskow.***

In 1997 only one film was shot, *Perfect Target*, directed by ***Sheldon Lettich*** and starring ***Daniel Bernhardt, Jim Pirri, Dara Tomanovich, and Robert Englund***. The following year, 1998, two more films were made: *Mercenary* and *Lost in the Bermuda Triangle*, directed by ***Philippe Mora*** and ***Norberto Barba*** respectively. The first featured ***Robert Townsend, Olivier Gruner, Nicholas Turturro,*** and ***Claudia Christian;*** the second ***Thom Verica, Charlotte d'Amboise, Christian Haag,*** and ***Graham Beckel***. The last film of the decade was *Which Way, Por Favor?*, filmed in 1999, directed by ***Mick Diener*** and starring ***Alisa Canaboy***, ***Nathaniel Eaton, Zack Lehtine,*** and ***Alfredo Santiago***.

In the 2000s, film production dropped considerably, with only four foreign films and no domestic ones. In terms of acting caliber, the most notable is the last one, shot toward the end of the decade in 2008: *Beverly Hills Chihuahua*, directed by ***Raja Gosnell***, with standout performances by ***Drew Barrymore and Jamie Lee Curtis***, alongside ***George López, Piper Perabo,*** and ***Manolo Cardona***. Another was *Puerto Vallarta Squeeze*, filmed in 2004 under ***Arthur Allan Seidelman***, starring ***Scott Glenn, Harvey Keitel, Craig Wasson,*** and ***Giovanna Zacarías***. This latter movie was produced by *Carolyn S. Chambers* as a special tribute to Puerto Vallarta, where Chambers lived for several decades.

The other two films were shot in 2002 and 2003. The first was *Warrior*, directed by ***Will Harper*** and starring ***Vincent Klyn, Yukmouth, Ronald D. Joseph,*** and ***Eddy Kariti.*** The second was *Deadly Swarm*, directed by ***Paul Andreasen*** and starring ***Shane Brolly, Kaarina Aufranc, J. Patrick McCormack,*** and ***Pepe Serna***.

From 2010 to 2019—the last year covered by our record of films—the shooting of films recovered considerably, totaling 13 in all, the second-highest count for any period, with one particularity: domestic films far outnumbered foreign productions, which came to five, versus eight Mexican films. Thus the 1990s were the most fruitful decade for foreign films in Puerto Vallarta (12, versus 4 domestic).

The foreign films shot between 2010 and 2019 were as follows. In 2010, two fantasy/science-fiction titles: *Sharktopus* and *Dinoshark*, directed by ***Declan O'Brien*** and ***Kevin O'Neill***, respectively. Leads included ***Eric Roberts, Kerem Bürsin, Sara Malakul,*** and ***Héctor Jiménez*** in *Sharktopus*, and ***Eric Balfour, Iva Hasperger, Aarón Díaz,*** and ***Dan Goldberg*** in *Dinoshark*. In 2014 came *The Sound of Spying*, directed by ***Philippe Mora***, starring***Rena Riffel, Paul Clemens, John Apicella,*** and ***Philippe Mora*** himself. In 2018 the fourth foreign film of the decade was *Blood, Sand and Gold*, directed by ***Gaelan Connell*** and starring ***Aaron Costa Ganis***, ***Monica West, Christopher Redman, and Jenny Sterlin***, among others.

The most important film shot between 2010 and 2019 was undoubtedly *Limitless*, by ***Neil Burger***, because the portion filmed in Puerto Vallarta brought the film's star, ***Bradley Cooper***, to the city. ***Abbie Cornish*** and ***Robert De Niro*** also appeared in the film.

It stands to reason that each film brought to Puerto Vallarta a large number of people—actors and actresses we have not listed, producers, film crews, and occasionally journalists. In the latter case, however, there was never again anything approaching the throng of reporters and media that covered *The Night of the Iguana*, drawn by the presence of the world's most famous romantic couple at the time, along with a great director and three actresses whose beauty and stature were an additional, unique magnet for the press. In any case, Hollywood—primarily—has been present in Puerto Vallarta for more than six decades through the many film figures who have come to work in this destination.

In all likelihood, many of them made it their place of temporary or permanent residence, whether or not they came to film—and those who did not were likely drawn by Puerto Vallarta's fame, enhanced by the magic, glamour, and mystique of cinema. We have no registry of this, but the origins of visitors or residents were not limited to the film industry: there were also musicians, visual artists, writers, and more.

Among others, in the 1990s such figures as ***Robert De Niro*** and ***Brendan Fraser*** arrived in Puerto Vallarta; in the same decade the singer ***Rod Stewart*** visited the city on several occasions (Reyes Brambila, n.d.), as did ***Don Henley*** of the rock group *The Eagles*. In recent years, Puerto Vallarta and Bahía de

Banderas (Punta de Mita) have hosted stars and singers such as ***Lady Gaga, Eva Longoria, Britney Spears, Justin Bieber, Selena Gomez, Christina Aguilera, Demi Lovato, Jennifer Lawrence, Anna Kendrick,*** and the couple ***Michael Douglas*** and ***Catherine Zeta-Jones*** ([https://www.lemuria.realstate] (https://www.lemuria.realstate)).

Puerto Vallarta naturally evolved into a high-end tourist destination and attracted international tourists in proportions that Chapala and Ajijic could hardly have matched. In the 1960s an estimated 300,000 tourists visited Puerto Vallarta, 80% of them from abroad. The absolute number rose rapidly, reaching more than 500,000 foreign tourists per year in the 1980s, around 900,000 annually in the 1990s, and up to 1.5 million annually in the 2010s. In the early decades of Puerto Vallarta's explosive tourism growth, from the 1970s onward, international tourism accounted for more than 60% of the total until the 2000s, when it began to decline in relative terms, reaching just over 30% of total tourists (domestic and foreign) today; yet in absolute terms, the total number of foreign tourists has increased by more than 500,000 compared to the 1990s—i.e., by more than 50%—now hovering around 1.6 million foreign tourists annually (Cortés, 2021).

Pioneers and Builders of the Foreign Community in Puerto Vallarta

As in Chapala/Ajijic, the first foreigners who visited Puerto Vallarta were impressed by the region's natural attractions—sparsely populated and lacking services and infrastructure beyond a semi-rural environment. The first visitors were occasional tourists, among whom there began to appear those who decided to make Puerto Vallarta their permanent—or at least seasonal—home. The foreign community began to take shape before the port's fame reached the international level brought on by the filming of The Night of the Iguana.

We know that the first foreign tourists began arriving in the second half of the 1940s and that from then on some began to seek accommodation consistent with a "residential tourism" dynamic. In fact, this latter practice would be present throughout the port's development, but it was predominant from the 1950s through the 1970s, when mass short-stay tourism to Puerto Vallarta began.

Among the first expatriates from the United States were ***Fredericka Southworth de Holt*** and ***Harry Milton Holt***, who arrived in 1949. Shortly after settling, the *Holtz* began valuable philanthropic work that would, over time, contribute in many ways to the development of the local community. Just a year after their arrival, for example, "they set up the first English academy—a valuable and highly necessary resource for a tourism-oriented Vallarta" (Scartascini, 2011, p. 115). The couple taught English personally and free of charge in a classroom at the **20 de Noviembre** school. In gratitude and recognition for their work on behalf of the people of Vallarta, "in 1972 they were named 'Distinguished Citizens' of Puerto Vallarta" in a moving tribute (Scartascini, 2011).

Soon many other expatriates followed the *Holtz'* example. An exceptional case for several reasons was the move to Puerto Vallarta by the American writer of African-American origin ***Willard Motley*** in 1951. Just a few years earlier, in 1947, *Motley* had written his acclaimed novel *Knock on Any Door*, later adapted to film by director Nicholas Ray and starring *Humphrey Bogart*, *John Derek*, and *Allene Roberts*. His experience living in Puerto Vallarta would inspire another novel, published posthumously under the title *Let Noon Be Fair*. Setting aside expatriate philanthropy, *Motley's* latter novel takes a critical look at the early stages of tourism that began to grow in Puerto Vallarta alongside *retirement migration*: "*Motley's* argument is that the economic benefits derived from tourism flowing from the United States are outweighed by effects such as the destruction of authentic Mexican culture, accompanied by the loss of self-respect among the town's citizens" (see *Literary Encyclopedia*). The work has "anti-imperialist" overtones and focuses its criticism on tourists who see "Las Casas" (Puerto Vallarta in the novel) as "a site favored by U.S. pleasure-seekers—sun and landscapes, exotic cultures and, not incidentally, an excessive permissiveness both hetero- and homosexual. Sex is everywhere in the novel…" (Barraclough, Bowen-Struyk, and Rabinowitz, 2015, p. 141).

Although Mexican by birth (from Oaxaca), ***Fernando "Freddie" Romero Escalante*** emigrated to the United States, where he lived for much of his life. He arrived in Puerto Vallarta in 1952, immediately dedicating himself to building homes—primarily for the growing number of expatriates already living there and for others with seasonal residence. His homes became famous for the archi-

tectural style he gave them, inspired by traditional Mexican architecture. Many were built along the Río Cuale, in the neighborhood already known as *Gringo Gulch*. Together with Guillermo Wulff, *Romero* helped create the so-called "Vallarta Style," with houses that drew on elements of the region's mountain architecture (adobe walls, red-tile roofs, ironwork grilles, and stone walls). Among Freddie Romero's works are 22 of Puerto Vallarta's most famous homes, each with its own name (PuertoVallarta.net, n.d.).

In 1952 the couple ***Bernice*** and ***Ed Starr*** visited Puerto Vallarta. She was a teacher in the state of Oregon and he was an illustrator at Disney Studios. Captivated by the place, they decided to move there two years later, in 1954, and by 1957 they owned a house designed by *Freddie Romero* in Gringo Gulch (PuertoVallarta.net, n.d.). *Bernice Starr* would soon become a figure of great importance to the local community—both expatriates and Mexicans. The crucial social role she played is comparable to that of *Neill James* in Ajijic and Chapala. When her husband died in 1971, "*Bernice* threw herself into philanthropic work—helping local children aspire to better education—as a way to continue enjoying life in her small paradise." To that end, she co-founded *Becas Vallarta América-México Foundation* (PuertoVallarta.net, n.d.). Another of her most important legacies was the creation of the *Los Mangos Library*, a project she began fighting for in the 1960s that finally came to fruition in 1995. And as noted earlier, she was one of the *Gringo Gulch Girls* who appeared as an extra in *The Night of the Iguana*.

Lucien Travis Flippen ("Flip"), originally from Laguna Beach and educated at Stanford University, lived in Puerto Vallarta beginning in 1956. He owned four fishing yachts that he rented to tourists who enjoyed deep-sea fishing (Masselnik, 1961).

Another notable figure was former Texas model ***Liz Rubey***, who lived in Puerto Vallarta beginning in 1956 (Quiroz, n.d.). *Rubey* had planned to travel to Acapulco with her sister, but during a layover in Guadalajara she was convinced to go to Puerto Vallarta instead. Enchanted by the place, she decided to spend the rest of her life there. A very hospitable woman, Rubey's parties in her Vallarta home—also designed by *Freddie Romero*—became legendary (Quiroz, op. cit.). The image of *Rubey* driving her Land Rover, on which Manuel Lepe had painted his signature childlike figures, was part of the town's landscape at the time.

Among her many contributions to the community was opening a local chapter of Alcoholics Anonymous. And, of course, she was another of the *Gringo Gulch Girls who took part in The Night of the Iguana.*

Jack Cawood arrived around this time, between 1957 and 1958, the year his *Hotel Playa de Oro* opened. Born in Nebraska in 1927 but raised in California, *Cawood* "read something about a fishing village on Mexico's west coast that captured his interest." He "had always wanted to live in a small fishing village more than anywhere else in the world," so upon learning of Puerto Vallarta in the early 1950s his logical decision was to move there in 1957 with his wife—originally from Peru—and their children. The place proved propitious for *Cawood's* business ventures. The first thing he did was build a 15-room hotel, "which became the *Hotel Playa de Oro*," a legendary place to stay in Puerto Vallarta. "Because the fishing was great," says Cawood, "I bought a boat—one of many to come. We had lobsters, shrimp, oysters, red snapper, and a wide variety of other fish. The bay was good to us" (Nelson, 2018).

Gloria and Goulven Elies, she Canadian and he French, were a couple of sculptors who resided in Puerto Vallarta beginning in 1958. According to Masselnik, the *Elies* "were the Gauguins of Puerto Vallarta" (1961). **Gloria** lived for 60 years between Puerto Vallarta and Yelapa, devoted to her art, leaving a significant legacy to the city. As a posthumous tribute, in May 2024 the sculpture El Pescador ("The Fisherman") was unveiled in one of the gardens of the *Hotel Rosita*—"something she had wished for since creating it way back in 1965; a dream fulfilled 59 years later" (López Becerril, 2024).

Among other additional names mentioned by *Masselnik* as already living in Puerto Vallarta by 1961 were the following: ***Clay Lindermuth***, a U.S. businessman who had "leased four beaches on the southern arm of Bahía de Banderas, where he intended to build Tahitian-style villas." The beaches in question were Las Ánimas—where *Lindermuth* lived—Quimixto, Mahahuitas, and Pizota (1961). Although the project was considered feasible, as it would "bring money and jobs to Vallarta," it does not appear to have prospered as its promoter expected. ***Guy Dickey*** was another immigrant from the United States who, together with his wife ***Rodelinda Pérez***, founded the restaurant *La Palapa*, located on Playa de los Muertos, just across from its main competitor, El Dorado, owned by

Guillermo and Nelly Wulff. (Reyes Brambila, n.d.). And ***Lynn Hewitt***, also from the U.S., who at the time owned the "most popular" restaurant on the malecón: *Del Mar* (Masselnik, 1961).

For his part, Sergio Toledano bears witness to other figures who had also moved to Puerto Vallarta by then. One was ***Charles Warwick Evans*** and his wife ***Bett***. Charles was a renowned British cellist who served as principal cello in the *Becham Opera Company* and the *Queen's Hall Orchestra*, which he left to dedicate himself fully to the *London String Quartet*, of which he was a founder. Toledano also mentions the renowned CBS journalist ***Charles Collingwood*** and his wife, actress ***Louise Allbritton*** ("Uncle Carlos and Aunt Luisa," as they were called). *Collingwood* was among the first great television journalists, along with such luminaries as *Walter Cronkite*, *Eric Sevareid,* and *Edward R. Murrow*. Among other works, his report "A Tour of the White House with Mrs. John F. Kennedy" was famous. The couple lived in Puerto Vallarta until their deaths—Charles in 1974 and Louise in 1979. Finally, another expatriate in Puerto Vallarta mentioned by Toledano was the influential brand designer ***Walter Landor*** (2021).

By the late 1950s, it was evident that a solid international community of expatriates was already living in Puerto Vallarta—perhaps approaching the figure *Life Magazine* estimated for Chapala/Ajijic: around 500 people among permanent and seasonal residents (*snowbirds*). What differed was perhaps the slightly lesser weight of the "bohemians" in Puerto Vallarta at that time compared to Chapala/Ajijic. Even so, that lifestyle meshed well with the characteristics of a town nestled at the foot of a lush mountainside by the sea. *Liz Rubey* led an uninhibited, quite bohemian lifestyle according to accounts of her personality. There were also *Beatniks* in Puerto Vallarta, though we have not found concrete references to named individuals.

Reflecting on the reception *Rubey* gave to journalist *Masselnik* (1961) and his wife ***Jo***, *Masselnik* described one of those present: "A genuine *Beatnik* arrived at the gathering, with a somewhat old-fashioned air and looking as if he were at a costume party; bearded, in authentic peon pants, shirt, huaraches, and palm hat" (1961). The bohemians who arrived in Puerto Vallarta coexisted, as in Chapala and Ajijic, with retirees and pensioners, businesspeople, and others with less—

or no—eccentric lifestyles; there were writers, painters, sculptors and, perhaps most importantly, people from the film industry, especially *Hollywood*.

In an article titled "*Mexico: Away from It All*," published in Look magazine on July 18, 1961, and devoted to hotel entrepreneur ***Bert Saunders*** and his family, who spent part of the year in Puerto Vallarta, the following paragraph appeared: Puerto Vallarta "is a new mecca for *avant-garde* Americans, from a world-renowned cellist to *Beatniks* seeking to get away from it all."

One difference, perhaps, lay in the degree of rapport between expatriates and the local Mexican population—some Vallartenses by genealogy and others by adoption—which in Puerto Vallarta was broader and more frequent. In any case, Mexican cordiality and hospitality were lavished in equal measure. In both Chapala/Ajijic and Puerto Vallarta, the first members of each foreign community interacted profusely with the local population. The difference is that in Puerto Vallarta this was a more pronounced pattern, and relationships were more permanent and deeper. This had to do with the fact that along with the first foreign residents, Mexicans also arrived from Guadalajara and various parts of the country—engineers, architects, restaurateurs, hoteliers, and entrepreneurs from different branches of the regional and local economy. In other words, there was also more domestic in-migration to the port.

The 1960s, especially after 1963, were also characterized by the arrival of numerous contingents of foreigners identified with the era's *Hippies*, with more eccentric lifestyles and a mentality unconstrained by many conventional moral norms. In general, they embraced a more open, tolerant, and permissive morality—more radical in this sense—especially regarding sexual freedom and the consumption of soft drugs (marijuana, hashish, mushrooms, and peyote).

Journalist *Helen Lawrenson* and *actress Deborah Kerr* noted the early arrival in Puerto Vallarta of people whose lifestyle was close to that of the *Hippies*. In the face of the network of relationships of the team that came to film, *Lawrenson* identified an attitude of the "please-pass-the-marijuana-let's-have-an-orgy" sort: "that is, a group of older, wealthy, divorced American women soothing their loneliness and boredom by surrounding themselves with handsome young men as if it were a lark" (as cited in Cortés, 2021, pp. 152–153). Intrigued by the growing number of tourists—and despite the inconveniences of the lodging—

Deborah Kerr supposed that "some came because a film was being made here, and the notoriety of the cast adds spice… but overall they seem a frightening lot. Rude, overdone or excessively ill-dressed, noisy and very drunk. The atmosphere of 'no restraints, anything goes, get drunk, smoke marijuana, be extravagant, nothing matters, nobody is watching' is quite overwhelming" (Cortés, 2021, p. 153).

A woman from Puerto Vallarta opined that the first tourists "were looking for a privileged place, and the other kind of tourists came to do another kind of business. The change in customs was felt little by little. That kind of tourism left its mark everywhere. People started coming—kind of *hippie*—whose customs were very different from those of the port" (Scartascini, 2011, p. 215).

By the end of the 1960s, the dynamics of the foreign community's expansion continued—faster now but with quantitative and qualitative differences relative to earlier years. The obvious reason for this shift, already mentioned, was the historic event of choosing Puerto Vallarta and Mismaloya to shoot *The Night of the Iguana*. We have already given hints of the large number of films, press, and cultural figures who converged on the town to star in, participate in, or bear witness to the event. Never again would Puerto Vallarta see a concentration of famous people like that of 1963, the year of the shoot—not even when the next film that again put Vallarta on the world's radar was made: *Predator*, directed by *John McTiernan* and starring *Arnold Schwarzenegger*, then at the height of his international fame.

Once the filming of *The Night of the Iguana* concluded, the number of tourists arriving in Puerto Vallarta was already taking a spectacular leap. But nearly all the film crew and cast returned to their places of origin—with a few exceptions. We do not know how many or which of them decided to join the local foreign community, but at least three of them—the most important of all—did. During the shoot, *Elizabeth Taylor* and *Richard Burton stayed at Casa Kimberly*, a magnificent residence in Gringo Gulch. When they decided to remain in Puerto Vallarta, Burton purchased the house and gave it as a gift to Liz Taylor, who turned 32 on February 27, 1964. To this property *Burton* added the estate across the street, which Peter O'Toole dubbed the *Pool House*. The two homes were

joined by a celebrated elevated bridge over Zaragoza Avenue, designed and built by engineer Guillermo Wulff.

Taylor and *Burton* were immediately considered members of the community and were given a discreet environment respectful of their privacy—without diminishing the deep admiration and affection they inspired. In a highly significant event, on December 24, 1963, both attended Midnight Mass at the Parish of Our Lady of Guadalupe like any other parishioners, accompanied by *Liz Taylor's* parents, ***Francis Taylor*** and ***Sara Southern***, and by her brother ***Howard Taylor*** and his wife and daughter (Cortés, 2021, p. 141).

The couple's established residence in Puerto Vallarta allowed both to proceed to divorce their respective spouses there. On December 16 of that year, Judge Arcadio Estrada Quiñónez granted Richard Burton a divorce from his then-wife Sybille Williams. The same judge would divorce Liz Taylor and Eddie Fisher on March 5, 1964, also in Puerto Vallarta. Finally, the couple married ten days later in Montreal, Canada.

The Burtons continued to travel for professional commitments but returned to Puerto Vallarta whenever possible throughout the decade. Another significant date, certifying their "belonging" to the Vallarta community, was May 13, 1969, when they stood as godparents to a 12-year-old Mexican boy. Liz and Richard served as sponsor and godfather for the First Communion of *Sergio Toledano*, nephew of Xavier de la Torre, the designer and owner of Villa Leonarda mentioned above. The Mass was also celebrated at the Parish of Guadalupe. "The event carried deep meaning, for it reclaimed the community's religious (First Communion) and social (compadrazgo) traditions, thereby consolidating Puerto Vallarta's urban imagination and reaffirming the Burtons as two of its fundamental architects" (Cortés, 2021, p. 162).

In 1967 another American actor, ***Phil Ober***, arrived to live in Puerto Vallarta with his wife ***Jane***. Though not of *Burton's* stature, Ober had a long film career, appearing in dozens of movies, and was part of the group that frequently gathered to play poker with *John Huston*. In 1980 *Ober* was appointed Consular Agent in Puerto Vallarta for the U.S. Consulate in Guadalajara—a post that gave him a prominent place within the expatriate community, which he served with acumen and timeliness.

To give a sense of the expansion of Puerto Vallarta's foreign community, it is pertinent to transcribe the roster of names published in 1971 in the *Foreign Colony Directory of Puerto Vallarta 1971* (Copyright 1971 by Rossmex, S.A.), priced at 50 Mexican pesos or 4 U.S. dollars at the time. It includes a total of 285 people. It is very likely not comprehensive and probably excludes a significant number of snowbirds or seasonal residents. But it is undoubtedly an important and, above all, representative count.

Table 1. Foreign Colony Directory of Puerto Vallarta, 1971

Name	Place of origin	Name	Place of origin	Name	Place of origin
Marion ALEXANDER	-	Bill and Marjorie BOLTON	Beverly Hills, Cal.	Mary Ann CLARK	Dallas, Tx.
John and Mary ALLEN	California	Frosty BRADEN	-	Ren and Bille CLARK	Ft. Worth, Tx.
Mr. And Mrs. Apple	-	Lee and Florencia BRIDGEMAN	Beverly Hills, Cal.	William COBBLEDICK	Oakland, Cal.
Bernardo and Teresa APPLEGATE	-	Horace BRISTOL	-	Charles and Louise COLLINWOOD	London, England
Mr. And Mrs Ricardo APPLEGATE	-	Gerald and Fritzi BROWN	-	Leslie and Jean CONKLIN	Reno, Nev.
Douglas APPLEGATE	-	Steve and Fran BRUNDAGE	Chula Vista, Cal.	Peter and Betty CONZE	Connecticut
Mildred AXTELL	Denver, Co.	Fred BUTLER	San Francisco, Cal.	Cameron COOPER	Detroit, Mich.
Paul and Kitty BANCROFT	San Francisco, Cal.	Richard and Elizabeth BURTON	London, England	Earl and Kay CORDREY	-
Mr. and Mrs. Charles BARON	Newsbury Park, Cal.	Boyd CALLAGHAN	Beverly Hills, Cal.	´Crit´ and Mae CRITENTEN	-
Herbert H. and Genevieve BENFIELD	Ancramdale N.Y.	Maurice CALTHORPE	-	George A. DAVIS	-
Jim BENTON	-	Virginia CARR	New York, NY	Jean DAVIS	California
William and Julia BERGIN	Los Ángeles, Cal.	Jack CAWOOD	-	Neil and Dorothy DAVIS	-
Pura BILBAO	-	Mike and Lynell CARTER	Los Ángeles, Cal.	Russel and Sara DAVIS	-
Beverly J. BITTNER	Tiburon, Cal.	Edward CHAMBERLAIN	-	Jacques C. DERNEY	Canadá
Ed and Sydnia BIXBY	Crysta City, Nev.	Irene CHAPMAN	San Francisco, Cal	Gordon and Harriet EDWARDS	San Francisco, Cal.
Bruce and Margaret EELS	Beverly Hills, Cal.	Ed FOUNTAIN	Los Ángeles, Cal.	Alfred and Bernice GREIG	San Francisco, Cal.

Name	Place of origin	Name	Place of origin	Name	Place of origin
Mike and Bea ESCONTRIAS	-	Al and Kay FRANKLIN	Los Ángeles, Cal.	Fred GRELLER	New York, NY
Bob and Lichia ESSAU	-	Landon and Polly FREEAR	Ft. Worth, Tx.	Pat and Betty GROOM	Glendale, Cal.
Watrwick and Beth EVANS	Malibu, Cal.	Lamar and Joyce GAINS	North Bend, Wash.	Connie GUTIERREZ	Canadá
Luis and Bixby FAVILA	-	Mr. and Mrs .Thomas GARRET	San carlos, Cal.	Milton and vera, GUNZBURG	Beverly Hills, Cal.
Charles FAWKES	Chicago, Ill.	Sy GATES	Seattle, Wash.	Doc and Gladys HALL	Los Ángeles, Cal.
Hal and Rae FERREL	Ft. Worth, Tx.	Dudley J. GEIGER	Los Ángeles, Cal.	Evers and Betsy HAMMES	Palm Springs, Cal.
Jerry and Eleonor FIELDS	New York, NY	Carolyn GIDDINGS	-	Mr. and Mrs. HARDY	Barrington, Ill.
Betty Sue FISHER	Franklin, Tenn.	Nicolas and Carol Birge GOMEZ	Canadá	Leo and Sybil HARTFIELD	Beverly Hills, Cal.
Douglas FLETCHER	-	José Luis and Bambi GONZALES	-	Joe and Lucille HELMUTH	Michigan
Axel and Dorothy FLINK	Placerville, Cal.	Al and Rose GOODMAN	Milwakee, Wis.	Frank and Peggy HARROL	-
James H. FOSTER	-	Louis and Selma GORDON	Boston, Mass.	George and Norma HEMMINGER	-
Travis FLIPPEN	-	Tom and Irene GREEN	Hayward, Cal.	Bob and Pat HENRY	-
Ellanor FONDRON	Houston Tx.	Robert and Marcella GEENING	-	Marj HENRY	Allenspark, Colo.
Ricardo FOOT	-	Jack GREENLY	Anaheim, Cal.	Ruth HERBRUCK	Pasadena Cal.
Mel and Jessie HESTER	Burbank Cal.	Wilbur Jr. KELLY	San Francisco, Cal.	William J. And Charlotte MARSH	New York, NY
Nancy HOGIN	Florida	Thaddeus Z. KILLAR	Carmel, Cal.	Ray and Rosa MARSHALL	San Clemente, Cal.
Graham HOLISTER	Reno, Nev.	Silver and Smokey KILLEN	California	James P. MASON	San diego, Cal.
Harry and Libby HOLT	-	George and Katherine KRAFT	Glendale, Cal.	Fred MARTIN	-
Mr. And Mrs. David HONEY	-	Harvey and Gloria LA DOUCER	Detroit, Michigan	Peter and Carmilita MATTEI	Danville, Cla.
William HOWE	-	Walter and Jo LANDOR	San Francisco, Cal.	Jay and Billy MATTICKS	-
Mr. and Mrs JACOSSI	-	Pedro and Mimi duke LARA	Mexico, DF.	Lucille McCONELL	Chicago Ill.
Al and Helen JACKSON	-	Lee and Mildred LEACHMAN	Rhinebeck, NY	Paul McLAUGHLIN	Alaska
Kurt E. and Jacqui JACOBI	Sherman Oaks, Cal.	Harry and Lois LEWIS	Atherton, Cal.	Mr. And Mrs. MENNINGER	-

Name	Place of origin	Name	Place of origin	Name	Place of origin
Jamey and Lenore JAMEISON	-	Paul and Pauline LOVE	Ft. Worth, Tx.	Bob and Ruth MERRIMER	-
Allerton and Joan JEFFRIES	Palm Springs ; Newport Beach, Cal.	Marion LOWE	Santa Cruz, Cal.	Kay, MILLER	Booth eBay Harbor, Maine
Mr. and Mrs. JOHNSON	Los Ángeles, Cal.	John and betty LUCE	California	Mary and Hal MILNES	Honolulu, Hawaii
Lee and Mary JOSSART	Wisconsin	William and Rosamarie MALTON	-	Charley and Gene MINNING	-
John L. KATHREIN	-	Joseph and Mildred MANZELLA	San Francisco, Cal.	Humberto and Darleen MANTECON	-
Max KELLER	-	Robert and June MARKOWITZ	Torrance, Cal.	James and Edna MOORE	Sacramento, Cal.
Name	place of origin	Name	place of origin	Name	place of origin
Ray MOORE	Seattle, Wash.	Beatrice PEABODY	-	Harry ROBINSON	Menlo Park, Cal.
Nick MORET	McAllen, Tx.	William and Gwen PIERSANTE	Detroit, Mich.	Betty Brown ROFF	-
Paul and Rosana MORRIS	-	E. Manya PLOGSTER	-	Bill ROSENTHAL	St. Louis, Mo.
John and Evelyn MUIR	Belvedere, Cal.	Brooks and Kay PRINGLE	-	Ercole and Annette ROSSILLI	Los Ángeles, Cal.
Earl and Drennie NELSON	Chula Vista, Cal.	Aikley and Guadalupe QUIRK	Los Ángeles, Cal.	Elizabeth RUBY	San Francisco, Cal.
Alexander NEWTON	-	Roger and Louise RANDOLPH	Tulsa, Okla.	Mike and Maxine SADLIER	Canadá
Carlos and Haydee NIVISON	Oregón	Roy RANDOLPH	Palm Springas, Cal.	James SCARBOROUGH	-
Gus and Mary NORDIN	Pasadena, Cal.	Griz and Mary RAITZE	San Francisco, Cal.	Bob and Pat SCOFIELD	-
Gus and Margaret NEIDERHOLTZER	San Francisco, Cal.	Bob and Lola RASMUSSEN	Los Ángeles, Cal.	Irving and Virginia, SERLIN	Chicago Ill.
Philip N. and Jane OBER	-	Richard H. REID	Carmel, Cal.	Harry and Ellie SHAFOR	Tarzana, Cal.
K. Ron O´HALLORAN	-	Mr. and Mrs. William REIST	Lake San Marcos, Cal.	Pete and Ann SHANKS	-
Tom and Patsy OLD	Santa Fe, New Mexico	Jose and Elena Cortes de RENAGHAN	San Clemente, Cal.	Robert SHEPLER	Phoenix,Ariz.
Les and Lila OSBORNE	-	Bette, RIDENOUR	Tustin, Cal.	Claire SHERWOOD	Connecticut
Peter OSTERMEYER	Arizona	Patricia A. ROANE	Jeanerett, La.	George SHERWOOD	-

Name	Place of origin	Name	Place of origin	Name	Place of origin
Margaret PARRA	Norfolk, Va.	Don and Pat ROARTY	Santa Monica, Cal.	Pate and Gigi SHIPLEY	-
Norwood and Helen SIMMONS	Pasadena , Cal.	Charles J. and Mary Lou TERREL	Ft. Worth, Tx.	Doug and Digur WEBER	-
Frances SINGER	Syracuse, NY	David and Lib THOMAS	Scottsdale, Ariz.	Helen WEIL	Providence, R.I.
William and Josehine SKINNER	San Bernardino, Cal.	Ralph TODESCA	-	R. Don WEST	Scottsdale, Ariz.
Peggy SMITH	-	Mrs. Frances TREMEAR	Indiana	Dantzi WHEATE	-
Norman and Inez SNEDDON	-	Jerry and betty ULICK	-	Robert N. and Marie WHITACRE	Los Altos Hill, Ca.
´Sody´and Kitty SODERSTROM	Chicago, Ill.	Mrs. Dorothy Vance	-	Bill and Irene WIGHTMAN	Santa Ana, Cal.
Ralph and Barbara SOTO-HALL	San Francisco, Cal.	Mark and Sheilah VANSITTART	-	Bizz and Alice WILCOX	McCall, Idaho
Monty and Helen SOUTH	Spokane, Wash.	Tom and Amaret VEATCH	Kansas city, Mo.	Richard and Karen WILES	Kansas City, Mo.
Mrs. Sky SPALDING	Denver, Co.	David VHAY	Reno, Nevada	Jack WILHOIT	-
Koern and Philo SROKA	-	Mr. and Mrs Voigt	-	Frances WILLIAMS	-
Ed and Bernice STARR	Studio City, Cal.	N.S. VON ROHR	-	Ralph and Mary Jane WILLIAMS	Los Ángeles, Cal.
William T. STEPHENS	San Diego, Cal.	George and Margot WAGNER	Los Ángeles, Cal.	William H. and Shirley WILSON	Santa Barbara, Cal.
Ruby STETSON	-	Frank and Natalie WALKER	-	Margaret WISS	Guadalajara, Jal.
Mel E. SUNESON	Laredo, Tx.	Harvey and Marjorie WARREN	Las Vegas, Nev.	Eilliam ZIMMERMAN	Los Ángeles, Cal.
Spurgeon and Jeanie SHUTERLAND	Arlington, Tx.	William C. and Mayo WARREN	San Francisco Cal.	Hanna (Mrs. Herman) ZISCHE	Woodside, Cal.
Tyler and Gerry SWEENY	New York, NY	Arthur and Nell WEAVER	Lawrence, Kansas	-	-
Jack and Ibby TAYLOR	Buffalo, NY	Mandy WEBB	Carmel Valley, Cal.	-	-

Two figures stand out in the preceding tables: of the 178 registered households, 107 (60%) were occupied by couples, while the remaining 71 (40%) were occupied by individuals living alone. In total, there were therefore 285 expatriates recorded in the directory. Regarding *place of origin*, considering both couple households and single-person households, 43% of the total (including

entries with and without origin data) came from California. Considering only the households with origin data, in 1971, 72.3% were from California. With this information at hand, we may hypothesize that close to 60% of expatriates residing in Puerto Vallarta came from some city in the state of California. This figure can plausibly be explained by three factors: they came from the cinematic "**mecca**" to a city projected to the world by cinema; at that time the only air connection to Puerto Vallarta, up to 1971, was with that state's capital, Los Angeles (the *Los Angeles–Mazatlán–Mexico City–Puerto Vallarta* route); and this was, moreover, the large U.S. city closest to Puerto Vallarta.

The names in the preceding tables naturally include several individuals we have already mentioned. Many more would be added in subsequent years, with some names deserving special notice. One of them stands out above the rest. In 1976, ***John Huston*** finalized his divorce from *Celeste Shane*, sold his St. Clerans estate in southern Ireland, and came to live in Puerto Vallarta for the remainder of his remarkable life. Huston secured a 20-year agreement with the *Chacala* community at Las Caletas beach, south of Mismaloya, where, thanks to that agreement, Freddie Romero built the residence he would occupy permanently. *Huston* himself wrote: "Las Caletas is my third home. The first was in the San Fernando Valley, on the outskirts of Los Angeles. The second was St. Clerans, in County Galway, in Ireland. I dare say that Las Caletas will be the last" (as cited in Cortes, 2021, p. 164).

The 1974 divorce of *Taylor* and *Burton* dissolved not only their marital bond but also began to weaken their belonging to the Vallartan community. Even so, *Burton* would return to Puerto Vallarta in 1977, now with his new wife, ***Susan Hunt***—the new Mrs. Burton—to whom he gave a house they christened **Casa Bursus**. In 1983 the couple would return to spend a season in Vallarta, shortly before their divorce. This would be *Burton's* last visit, as the actor passed away in August of the following year, 1984. In 1990 *Susan* severed her ties with Puerto Vallarta and sold her house to ***Janicce Chatterton***—another expatriate resident in the city.

After Richard Burton's death, *Elizabeth Taylor* would return to Puerto Vallarta on two occasions. The first was in 1986, when she came with her then-partner,

actor *George Hamilton*, and they stayed at Casa Kimberly. The second, and final, occasion was in 1989, when she returned to sell Casa Kimberly.

Jeri Grant is "another expatriate" who arrived in Puerto Vallarta in 1980 and, after traveling through different parts of Mexico during that decade to deliver yachts to "their owners," ultimately settled permanently in the city. Evidently, she was drawn by the beauty of the place, which left a deep and lasting impression on her. According to *Jeri* herself, Vallarta "was beautiful and green, and the air so fresh… when I first saw it from a yacht, the entire city was a white maze with red-tile roofs. It looked like a truly magical place." *Grant*, writes Nelson (2018), "never left Puerto Vallarta and never will."

Another important foreigner, ***Pietro Rizzuto***, first came to Puerto Vallarta in 1982 from Canada, though he was Italian by birth. In 1988 he opened the first hotel of the *Jack Tarr* chain in Bahía de Banderas and from then on distinguished himself as a visionary investor in Puerto Vallarta and Bahía de Banderas, to whose tourism development he contributed greatly.

The expatriate couple ***Celia*** and ***Ron Walker*** brought two other important figures to Puerto Vallarta, particularly for their decisive participation in philanthropic—as well as social and cultural—activities. Both were part of the *International Friendship Club*, founded in 1985 by U.S. and Canadian nationals. That same year, the *Walkers* spearheaded within the club the *Cleft Palate Program*, which serves children with cleft palate or cleft lip and has since become a hallmark program of the Club (Club Internacional de la Amistad de Puerto Vallarta, n.d.).

The Italo-Canadian entrepreneur ***Graciano Sorvellino*** made a special contribution to the tourism, economic, and urban development of Nuevo Vallarta from the late 1980s onward. He was a founding partner of the Asociación de Empresarios de Puerto Vallarta y Bahía de Banderas. He was the architect of the *Paradise Village* resort complex, which integrates residential and ecclesiastical tourism services alongside a business center, a marina, and a golf club.

It should not go unmentioned that in 2014 ***Bill Gates*** became the owner of the Four Seasons Hotel in Punta de Mita and that since then he has contributed to the social, economic, and cultural transformation of the southern part of Bahía de Banderas. The hotel would soon become a privileged destination accommo-

dating film stars, famous singers, and major entrepreneurs from industry, technology, finance, and the media.

Finally, we must include in this roster of names within the retirement community of Puerto Vallarta/BB two women who have carried out extraordinary work. The first is ***Pilar Pérez***, whose case is similar to that of Freddie Romero. Born in Puerto Vallarta, she moved to California to pursue undergraduate studies in Latin American Literature at the University of California, Irvine, and graduate studies in the Master's in Museographic Studies. "She served as Director of Exhibitions at Track 16 Gallery in Bergamot Station, Santa Monica, as well as Editor-in-Chief at Smart Art Press. In 2002, Pérez co-founded Perceval Press with Viggo Mortensen" (OPC, n.d.). She has participated in a multitude of cultural projects and events on both sides of the U.S. border, as well as in Europe (Spain and Ireland). In 2014 she founded, together with María José Zorrilla, Fernando Sánchez, Oscar Morán, and David Birks, the ***Oficina de Proyectos Culturales*** in Puerto Vallarta. This entity now has its headquarters in a major museum in the city center, where high-quality artistic events and exhibitions are held, and—above all—has become a space of convergence between the expatriate community and Mexican residents in Puerto Vallarta.

The second woman is the U.S. national ***Kelly Trainor***, who took up residence in Puerto Vallarta in 1988 as Consular Agent of the United States in Puerto Vallarta, a responsibility she held until 2021. Since the following year, 2022, she has served as Honorary Consul of the U.S. Embassy with jurisdiction in the state of Nayarit. She is a prominent figure in the area and a decisive architect of the "international community" in Bahía de Banderas. Her work has transcended consular functions: she has linked the expatriate community with the Mexican population, and various public entities with private actors, to carry out important projects and cooperation programs for the development and well-being of the local population. Among the NGOs she has promoted, the *Festival Internacional del Altruismo* stands out, where all philanthropic initiatives from Puerto Vallarta and surrounding towns converge. Her dedication and work have made her an undisputed leader, fully committed to the well-being of the region. In sum, she has built institutional security and trust, the promotion of cultural integration, symbolic capital, and everyday diplomacy.

Up to this point we have listed the names of some of the pioneers and architects of the foreign community in Puerto Vallarta, a community that would begin to extend to the northern shore of Bahía de Banderas from the 1980s onward. It is a collectivity that has evidently grown over time and is currently estimated at around 30,000 people. If these estimates are close to reality, of that figure approximately 7,200 would be *permanent* residents in the area, and the remaining roughly 22,800 would be *seasonal* residents or *Snow Birds*. This is a considerable population that gives an indisputable international dimension to the daily life of Puerto Vallarta and Bahía de Banderas, and which has already spread further to towns that make up the so-called Riviera Nayarit, such as Sayulita, San Francisco, and Lo de Marcos.

PART II
Survey of Values and Attitudes of Expatriates in Ajijic / Chapala and Puerto Vallarta / Bahía de Banderas

CHAPTER 3.
Demographic Profile, Residence, and Living Conditions of Expatriates in Puerto Vallarta / Bahía de Banderas and Ajijic / Chapala

To outline the principal identity contours of the foreign communities in Ajijic / Chapala and Puerto Vallarta / Bahía de Banderas, it is necessary to draw an initial distinction between foreigners who arrive at each destination as short-stay tourists, on the one hand, and permanent or seasonal residents on the other. Without delving too deeply into this point, it is worth recalling that short-stay tourism is, by far, much more abundant in Puerto Vallarta/Bahía de Banderas (exceeding one and a half million annually), whereas it is comparatively limited in Ajijic/Chapala. Thus, among the foreign population arriving in both destinations, short-stay tourism predominates numerically in Puerto Vallarta, while residential tourism clearly predominates in Ajijic/Chapala. What concerns us in any case is the movement of expatriates to these two localities, within what is also commonly termed *retirement migration*, which in Ajijic/Chapala is mostly of a *permanent-residence* nature (with a small proportion of seasonal residents), whereas in Puerto Vallarta/BB it is predominantly *seasonal* and, to a lesser extent, permanent.

For understandable reasons, the survey whose results are analyzed below was administered to seasonal or permanent residents in both locales. The analysis proceeds in two stages: first, we examine results aggregated by community; second, we disaggregate by community and nationality (the two predominant nationalities, U.S. Americans and Canadians). For certain variables, we compare these results with data corresponding to the general populations of the United States and Canada, drawn from the *World Values Survey*. This is feasible becau-

se our instrument incorporates a substantial number of items from the questionnaire used in that survey.

Demographic characteristics of the expatriate community

Since, in essence, movements to the two destinations under study form part of *retirement migration* (comprising retirees and pensioners), *age* and *generational* cohort constitute the primary variables in the profile of the communities analyzed here. It follows that the average age of expatriates is logically high, generally exceeding sixty years. Here, however, we observe the first difference between the two communities: the average age of expatriates in Ajijic/Chapala is 70 years, whereas in Puerto Vallarta/Bahía de Banderas it is 64. Among other things, this suggests that the rate of population replacement is somewhat higher in the former destination. This invites the question of whether such turnover alters factors such as the perspectives that new expatriate cohorts hold regarding the destination or the kinds of ties established with the local population (Truly, 2002).

To elaborate, we observe that the great majority of expatriates fall within the 50–80 age range in Puerto Vallarta (91%), while in Ajijic/Chapala they are concentrated in the 60–80 range (89%). Thus, those under 60 years of age account for 28% in Puerto Vallarta, compared to just 11% in Ajijic. Likewise, those under 50 represent 7.1% in the former, but only 2.6% in the latter (see Table 2). We shall see that the amount of "younger" population is explained by the types of recreational activities characteristic of each destination: sun, beach, and nightlife in Puerto Vallarta; and social interaction, rest, and cultural activities in Ajijic/Chapala—together with a labor market for foreigners of working age, broadly speaking.

In *generational* terms, *Baby Boomers* overwhelmingly predominate in both locales: 87.9% of expatriates in Puerto Vallarta/BB and 94.4% in Ajijic/Chapala. Rough "back-of-the-envelope" estimates indicate that in Puerto Vallarta, 2.9% of expatriates belong to the *Millennial* generation and a larger 9.2% to *Generation X*. In Ajijic/Chapala, the presence of these two generations is understandably smaller: 0.8% *Millennials* and 4.8% *Generation X*. We therefore find limited

generational diversity in Puerto Vallarta and very limited generational diversity in Ajijic/Chapala.

Table 2. Age

Age range	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
30-40	2.9	0.8
41-50	4.2	1.8
51-60	21.3	8.3
61-70	45.7	39.8
71-80	24.4	41.6
81+	1.6	7.8
Total Cases	381	397
Average age (years)	64.1	70.0

From this it follows that both localities align with the prevailing focus of international migration research, which centers precisely on the movements and migratory interests of the *Baby Boomers*. For this reason, it is also worth bringing up a particularly significant fact. According to a study by the *Pew Research Center* (Fry, 2016), *Millennials* are already more numerous than *Baby Boomers* in the United States: in the 2019 census, the former totaled 72.1 million people, while the latter fell to second place with 71.6 million.

Briefly, the explanation is that while the life cycle of the *Baby Boomers* has been approaching its end—and many of them, as retirees, have been ***emigrating*** from the United States to other countries—*Millennials* have grown through the influx of young ***immigrants*** and a birth rate typical of Latino *immigrant* populations to the United States. In any case, generational replacement due to natural causes is the principal explanatory factor. The medium- and long-term implication is that *Generation X*—followed later by the Millennials—will begin to grow within the population of *retired expatriates*, both in Puerto Vallarta and in Ajijic, progressively approaching the proportion of the *Baby Boomers*.

In the first part of the book, moreover, we observed that belonging to the *Baby Boomer* generation intersects with the history and evolution of both communities over the past century and into the present, which in turn is expressed

in the particular *mindset* and *cultural* and *political identity* of each foreign community analyzed here—together with the differences observed between them.

For its part, the *gender* distribution follows the normal patterns typically observed in this area: the female gender outnumbers the male (Table 3). In Puerto Vallarta the respective percentages are 53% versus 47%, and in Ajijic/Chapala those percentages are 52.1% versus 47.9%. As can be seen, there are no differences between the two communities. One might have expected, however, that the gap between the proportion of women and the number of men would be even greater, given that male mortality rates rise in parallel with aging, more so than in the case of women. But probably because we are dealing with a migrant population, in addition to retirees and pensioners, the rule is tempered in this case. International mobility would modify the behavior of demographic variables such as individuals' age by sex, whether male or female.

Table 3. Sex

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Female	53.0	52.1
Male	46.7	47.9
Cases	383	399

This is also the case for the marital status of expatriates in both communities (Table 34). In Puerto Vallarta/BB, 64.8% are "Married," compared with a lower share in Ajijic/Chapala, where 53.3% are married—still a majority, though ten percentage points below the former. Adding those who "Live with a partner as if married," Puerto Vallarta/BB reaches 14.1%, versus only 6.5% in Ajijic/Chapala. Taken together, these two categories amount to 78.9% in Puerto Vallarta/BB and 59.8% in Ajijic/Chapala (a difference of nearly twenty percentage points). By contrast, the categories "Widowed" and "Divorced" together total 21% in Ajijic/Chapala, compared with only 8.8% in Puerto Vallarta/BB.

Table 4. What is your current marital status?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Chapala
Married	64.8	53.3
Living with a partner as if married	14.1	6.5
In a relationship	-	0.1
Divorced	4.4	10.3
Separated	2.1	2.0
Widowed	4.4	10.7
Single	9.9	15.6
Cases	382	399

It is noteworthy that the second most numerous category in Ajijic/Chapala is "Single," accounting for 15.6% of cases, compared with only 9.9% in Puerto Vallarta/BB. The sum of "Single," "Widowed," and "Divorced" in Ajijic/Chapala reaches 36.6%, that is, just over one-third of the expatriates residing there. Based on the behavior of other survey variables analyzed in subsequent sections, we might infer that this particular segment compensates for its personal circumstance (living alone) through civic ties, identity-based connections, and friendships, which are, overall, particularly strong in Ajijic/Chapala.

On the other hand, in both communities the population of North American origin (Canada plus the United States) predominates, in almost identical proportions: 94.8% in Puerto Vallarta/Bahía de Banderas and 93.3% in Ajijic/Chapala (Table 5). Of the remaining ~6%, 3.3% originate from a European country. However, there is a notable difference: in Puerto Vallarta Canadians outnumber U.S. citizens, 56.4% versus 38.4%, whereas, conversely, in Ajijic/Chapala U.S. citizens constitute a larger contingent than Canadians: 66.2% versus 27.1%.

Table 5. Nationality

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
U.S. citizen	38.4	66.2
Canadian	56.4	27.1

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
British	1.0	0.8
Spanish	0.8	-
Some European country	1.5	2.9
Latin American	0.9	0.3
Other	0.3	3.1
Total Cases	380	399

In PV, DK/NA are counted as missing.

These are significant differences that, as we shall see, appear to be reflected in the cultural profiles of each expatriate community. First, Canadians outnumber U.S. Americans by 18 percentage points in Puerto Vallarta, whereas in Ajijic U.S. Americans, in turn, outnumber Canadians by 39 percentage points. Second, national homogeneity differs among Canadians since, unlike U.S. Americans, they divide their identity profile between Anglophones and Francophones (Quebec). Third, in any case, differences among U.S. Americans are more political in nature, splitting between conservatives (Republicans) and liberals (Democrats)—a pattern that, as we will see, holds in Puerto Vallarta but not in Ajijic.

The educational attainment of expatriates in each community is another crucial variable, which we assume is likewise related to the distinctive cultural characteristics of each community. In general, the *education level* of expatriates in both communities can be considered *high*. However, Table 6 records quite notable differences in the level of studies achieved in each case, which should, of course, be taken into account.

As can be seen, 16% of respondents in Puerto Vallarta/Bahía de Banderas reach only the secondary level (technical, high school), whereas in Ajijic/Chapala only a minimal 0.5% fall within this level (a difference of 15.5 percentage points fewer). At the "university-track" or preparatory secondary level, 24.8% of cases are found in Puerto Vallarta/Bahía de Banderas, compared to a much smaller figure of just 4.3% in Ajijic/Chapala. A relative majority of cases in Puerto Vallarta/Bahía de Banderas, 31.3%, report tertiary studies of the College or Community College type, and 25.3% university studies, plus 2.3% at the

postgraduate level. In Ajijic/Chapala, 17% fall within the Community College level, another 33.6% have "university" studies, and—strikingly—40.6% have attained the "postgraduate" level.

Table 6. What is the highest educational level that you have attained. What is your educational level?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Chapala
No formal education	1.0	-
Primary	1.0	0.5
Secondary/Technical/High School	14.1	3.6
Secondary: University. preparatory type	24.8	4.3
Community College/College/other tertiary education	31.3	17.0
University	25.3	33.6
Posgraduate	2.3	40.6
Cases	383	399

If we consider only the "University" and "Postgraduate" levels, Puerto Vallarta/BB accounts for 27.6% of cases (about one quarter of all expatriates residing here temporarily or permanently), whereas Ajijic/Chapala accounts for 74.2%, that is, nearly three quarters of the expatriates residing there[1]. Looking only at the postgraduate level, the proportion at this level is 17 times higher in Ajijic/Chapala (40.6% postgraduate) than in Puerto Vallarta/BB (2.3%), and, moreover, it is 46 percentage points higher.

The higher level of schooling among expatriates in Ajijic/Chapala plainly means that they have a better education and, therefore, a predisposition toward consuming a greater quality and diversity of cultural goods, in contrast with their counterparts in Puerto Vallarta/BB. In addition, it undoubtedly helps explain the

[1]. These percentages align with those reported for the "Ribera de Chapala" in the study by González-Rojas and Aikin Araluce (2022), where 39% are at the *Licenciatura* (Bachelor's) level and 41% at the postgraduate level (*Maestría* and *Doctorado*).

prevailing orientations in Ajijic/Chapala regarding important—and controversial—issues of public morality, as well as in matters of political identity and party identification, topics that we will analyze later on.

Type of residence and living conditions

In general, the living conditions of expatriates are an important complement to the reasons for choosing each of the two migratory destinations. In this regard, the survey results are presented below concerning relevant matters such as the type and length of residence, the spatial location of expatriates, their employment status and personal income, and the forms of social interaction established with both the local and foreign populations.

The type of residence also marks a very clear difference between the two foreign communities analyzed (Table 7). Whereas in Ajijic/Chapala those who report residing "Permanent" amount to 68.2% (that is, two thirds), in Puerto Vallarta/BB this is the case for only 18%. Conversely, those who reside "seasonally every year" (the well-known *snow birds*) account for 62.4% in Puerto Vallarta/BB, compared to 13.5% in Ajijic/Chapala. The figures change if we add "permanent residents" to "permanent residents who live part of the year elsewhere." In Puerto Vallarta/BB the figure rises to 24%, whereas in Ajijic/Chapala it climbs to 78.7%.

Table 7. Speaking of your residence in Puerto Vallarta / Bahía de Banderas, or in Ajijic / Ribera de Chapala, UD

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Reside permanently	18.0	68.2
Reside seasonally every year	62.4	13.5
Consider yourself a permanent resident, but live part of the year elsewhere	6.0	10.5
Visit seasonally, but not every year	8.1	3.8
Other options	5.5	3.5
DK/NR	-	0.5
Total Cases	383	399
%	100.0	

This finding suggests important consequences for each community. First, the seasonal cycle of visitors that prevails in Puerto Vallarta is not replicated in Ajijic. The high season in Puerto Vallarta is defined by the arrival of foreign tourists, as well as temporary residents, primarily from the United States and Canada, between October and April—that is, during the coldest months in those countries. During the remainder of the year, tourism is sustained mainly by domestic visitors; however, there are several months—the low season—when tourism activity is virtually nonexistent. Colloquially, and through a play on words, residents of Puerto Vallarta refer to this period as "septihambre," a blend of septiembre ("September") and hambre ("hunger"). By contrast, although a somewhat similar pattern can be observed in Ajijic/Chapala, its demographic scale is considerably smaller.

It could therefore be said that, whereas "permanent international retirement migration" from north to south clearly predominates in Ajijic/Chapala, in Puerto Vallarta/BB approximately one-quarter of foreign residents unquestionably fall into this category. What predominates there, however, is what might be termed "seasonal international retirement migration," likewise occurring from north to south.

It may also be speculated that, as a result, significant differences exist in the intensity of integration among the members of each community and between them and the local population; in the number and strength of social and friendship networks among expatriates; and in the degree of collective identity they develop. In sum, it can be argued that neither the density of the social capital they generate nor their ability to undertake collective projects and activities is the same. Their type of residence would therefore produce differences reflected in the degree of group cohesion and in their particular agency—that is, in their characteristic capacity for action.

Table 8. Since what year have you been visiting or residing in?

	Puerto Vallarta / Bahía de Banderas	Ajijic/Ribera de Chapala
1967-1980	3.4	1.2
1981-1990	8.9	0.6
1991-2000	15.7	5.8
2001-2010	25.3	22.7
2011-2016	21.1	26.7
2017+	22.5	43.0
NS/NC	3.1	-
Total Cases	383	354

Table 8 presents the survey results for the question, "Since what year have you been visiting or residing in each destination?" This question is particularly relevant because of the difference in longevity that distinguishes one community from the other. The Ajijic/Chapala community began to take shape in the 1920s, whereas the Puerto Vallarta community did not emerge until the late 1940s and early 1950s. Nevertheless, given the generation that predominates among the expatriate population, the dates of first arrival in the two destinations are relatively close, beginning in the late 1960s. There are, however, notable differences that are not easily explained.

Between 1967 and the end of the century, in 2000, 28% of the expatriates surveyed arrived in Puerto Vallarta, whether as permanent or seasonal residents, with the latter constituting the majority, as previously noted. By contrast, only 7.6% arrived in Ajijic/Chapala during the same period. Between 2001 and 2016, 46.4% of Puerto Vallarta/BB's foreign residents arrived, compared with 49.4% in Ajijic/Chapala—two fairly similar figures. It is therefore evident that the growth of the foreign community in Ajijic/Chapala is more recent. Considering foreign migration from 2011 onward, 70% of the expatriates in Ajijic/Chapala arrived during this period, compared with 43.6% in Puerto Vallarta/BB—a difference of approximately 26 percentage points in favor of Ajijic. The more gradual arrival curve for Puerto Vallarta reaches its peak of 25% during the 2001–2010 decade, whereas the Ajijic/Chapala curve rises sharply to its peak of 43% from 2017 onward. In other words, over the course of only about a decade and a half,

two-thirds of Ajijic/Chapala's expatriates moved to the area, while the remaining third migrated to this destination over a period of four decades.

Retirement migration in Puerto Vallarta appears to have developed alongside the construction of residential properties along the coastline of Banderas Bay, extending southward and, more intensively, north of Puerto Vallarta into the Riviera Nayarit, beginning at the turn of the twenty-first century. The abrupt increase in retirement migration, primarily toward Ajijic/Chapala, appears, for its part, to coincide with Donald J. Trump's first victory in a United States presidential election. Chapter 4 examines the probable reasons for this unusual movement of the foreign population.

Employment status also differs between the two foreign populations (Table 9). Although those who work constitute a marked minority in both locations, it should nevertheless be noted that the proportion classified as "Employed" is considerably higher in Puerto Vallarta/BB than in Ajijic/Chapala: 18% compared with 8%, respectively. Once again, age is a determining factor, since 28% of the foreign population in Puerto Vallarta is under the age of 60 and is therefore of working age, whereas the corresponding proportion in Ajijic is only 11%.

Consequently, the proportion classified as "Retired" is higher in Ajijic/Chapala, accounting for 92% of cases, compared with 80.2% in Puerto Vallarta/BB. Retirees constitute the overwhelming majority of the foreign population in both locations; however, because the average age is higher in Ajijic/Chapala, the proportion of retirees is correspondingly greater.

Table 9. Do you currently work?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Works	18.0	8.0
Retired	69.2	81.5
Retired, works occasionally	11.0	10.5
Cases	376	399

Among those who "work," plus the "retirees who do so occasionally" (29% in Puerto Vallarta and 18.5% in Ajijic), are individuals who work "online" (pre-

sumably the younger cohort) and those who have opened businesses to provide some type of local service: bars, restaurants, cafés, tourism or health services, and real estate, among others.

Logically, the main source of income is "pensions," or pensions combined with "financial returns" (the product of savings invested over a lifetime) and "business remuneration" (Table 10). "Pensions" are the sole source of income for 33.4% of foreigners in Puerto Vallarta/BB and for 31.8% of those living in Ajijic/Chapala. As can be seen, these figures are very similar. The same holds for those who report "pensions plus salary or business remuneration": 7.6% in Puerto Vallarta/BB and 6% in Ajijic/Chapala. The differences are particularly evident in income from "pensions plus financial returns": this is the source of income for 28.2% of expatriates in Puerto Vallarta/BB and for 39.6% in Ajijic/Chapala. Considering the three sources together (pensions, and pensions plus interest and gains), the share is 69.2% in Puerto Vallarta versus 77.4% in Ajijic/Chapala. "Financial returns from investment" alone constitute the only source of income for 7.6% in Puerto Vallarta/BB, compared to 12.8% in Ajijic/Chapala.

Overall, what emerges thus far is a higher proportion of retirees in Ajijic/Chapala compared to Puerto Vallarta/BB. Conversely, the larger share of those under 60 years of age in Puerto Vallarta/BB is reflected—particularly—in the higher proportion who cite "salaries or business remuneration" as their source of income: 15.9%, versus only 5% in Ajijic/Chapala.

Table 10. What is your main source of income?

	Puerto Vallarta / Bahía de Banderas	Ajijic/Ribera de Chapala
Pension	33.4	31.8
Salary or business remuneration	15.9	5.0
Pension plus salary or business remuneration	7.6	6.0
Pension plus financial returns (investment)	28.2	39.6
Financial returns (investment)	7.6	12.8
Other	5.0	4.5
No answer	2.3	0.3
Cases	376	399

Table 11. In which annual income range do you fall?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Less than 20,000 USD	7.0	9.3
Between $20,000 and $30,000	12.8	19.6
Between $30,000 and $60,000	23.8	40.7
Between $60,000 and $100,000	26.9	21.6
More than $100,000	17.8	8.8
DK/NR	11.7	2.7
Cases	383	399

Having examined their sources of income, we also investigated the amounts earned by foreign residents in both locations. A quick glance at Table 11 reveals that personal incomes are higher among expatriates in Puerto Vallarta/BB than among those in Ajijic/Chapala. In the latter location, the largest income bracket is USD 30,000 to USD 60,000 per year, accounting for 40.7% of respondents, whereas the largest bracket in Puerto Vallarta/BB is USD 60,000 to USD 100,000 per year, representing 27%. When the categories are combined, 43.6% of respondents in Puerto Vallarta/BB earn between USD 20,000 and USD 60,000 annually, compared with 60% in Ajijic/Chapala. Conversely, 44.7% of respondents in Puerto Vallarta/BB earn between USD 60,000 and more than USD 100,000 per year, compared with 30% in Ajijic/Chapala. This difference might be even greater were it not for the predominance of seasonal migration to Puerto Vallarta/BB during the high season, as previously discussed.

Income in foreign currency is an important variable, as it ultimately determines the magnitude of the *economic spillover* generated by the foreign population in both localities. From the outset, it can be inferred that this constitutes an inflow of resources and foreign exchange that drives the social and economic development of each region, naturally to the benefit of each host community.

The housing conditions of the foreign population are also relevant. This is due, first, to the level of comfort sought by those residing in either destination, whether seasonally or permanently, and second, to the fact that real estate is often the principal field of activity among expatriates who conduct business in

these locations. Property ownership must also be considered, together with respondents' assessments of the size of their homes, their monetary value, their location, and the safety of the neighborhoods in which they are situated. Additionally, it is important to determine with whom the respondents share their households.

Table 12. The house or dwelling where you reside is

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Owned	50.7	56.1
Rented	44.1	41.4
Borrowed	0.5	0.5
Timeshare	1.0	-
Other	3.7	2.1
Cases	383	399

Table 12 presents the survey results concerning ownership of the residences occupied by the foreign population. In both locations, approximately half of the expatriates live in homes they own: 50.7% in Puerto Vallarta/BB and 56.1% in Ajijic/Chapala. Rented housing, meanwhile, is occupied by 44.1% of foreign residents in Puerto Vallarta/BB and 41.4% in Ajijic/Chapala. The figures are therefore quite similar in both cases, although it should be noted that, even if the difference is relatively small—5.4 percentage points—homeowners are slightly more numerous in Ajijic/Chapala.

For reasons to be noted below, the location of the dwelling can also be considered relevant (Tables 13 and 14). If we regroup the information for Puerto Vallarta, we find that—given the length of the bayfront—there is considerable spatial dispersion among expatriates residing primarily in owned or rented housing. The greatest concentration of dwellings (Table 12) lies within the area encompassed by el pueblito, that is, within the boundaries of historic Puerto Vallarta, characterized by its distinctive features (cobbled streets, tile roofs, traditional Mexican architecture), accounting for one third of cases: 34.1%. Another 20% of residences are located in the municipal seat, but in areas adjacent to the strictly "typical" town, bringing the total to 54% of foreign residents with

housing in the municipal seat of Puerto Vallarta. Sixteen percent are unspecified, and the remaining 30% are distributed along the coastal area of the Nayarit municipality of Bahía de Banderas, with Nuevo Vallarta predominating at 16.2% of cases and Bucerías at 5.2%.

Table 13. Where is the dwelling in which you reside permanently or seasonally located?

	Puerto Vallarta / Bahía de Banderas
Romantic Zone	18.0
Nuevo Vallarta	16.2
Downtown	11.2
Hotel Zone	8.9
La Cruz de Huanacaxtle	7.6
Marina Vallarta	6.3
Bucerías	5.2
Versalles/Fluvial	3.9
Conchas Chinas	1.8
Amapas	1.8
Gringo Gulch	1.3
In the Mountain Area	0.8
Punta Mita	0.8
Other	16.0

Comparatively, foreign residents' dwellings are geographically more concentrated in the Ajijic/Chapala area (the lakeside strip from Chapala to Jocotepec). More than half (67.8%) are located in the town of Ajijic (including La Floresta, San Antonio Tlayacapan, and Riberas del Pilar). This is nearly double the proportion corresponding to historic Puerto Vallarta. After Ajijic, the next highest shares are far lower: Jocotepec (8.5%) and San Juan Cosalá (8.1%, including the Racquet Club), and even less in Chapala (2.3%). Initially, Chapala was the preferred destination for foreigners, and there the first community of expatriates with permanent homes took shape, albeit on a small scale. They were few, but they built spectacular estates, some of which still survive. Since the 1940s, mi-

gration has consistently shifted toward Ajijic, with markedly greater dynamism over the last decade.

Whether expatriate residence is temporary or permanent, the demand for housing has nonetheless had a distinct impact on both urban areas. Broadly speaking, two effects can be distinguished—one positive and the other negative.

Table 14. Where is the dwelling located in which you reside permanently or seasonally?
Ajijic / Chapala

	Ajijic / Ribera de Chapala	Ajijic Printed materials
Ajijic	51.9	60.4
Jocotepec	8.5	0.5
Ajijic (Floresta)	5.3	10.4
San Antonio Tlacayapan	4.3	8.2
San Juan Cosalá	4.3	1.6
Chula vista	4.0	1.6
Racquet Club	3.8	1.1
Riberas del Pilar	3.5	6.6
Canacinta	2.8	1.1
Chapala	2.3	3.8
San Nicolás de Ibarra	1.0	1.1
Other	2.1	3.2
DK/NR	6.3	0.5
Cases	399	182

The positive aspect is that this demand aligns with the imagined ideal that expatriates bring with them, in which rustic, Mexican-style properties, cobblestone streets, red-tile roofs, and, more generally, the atmosphere of a typical Mexican town occupy a prominent place. This has produced a conservation effect that contributes to the preservation of the traditional urban landscape and its architectural heritage. The effect has consisted in maintaining the features and urban

scenery that identify Puerto Vallarta ("el pueblito") and, especially, the Ajijic area, and to some extent has prevented their destruction.

The negative effect is the *gentrification* process that has surged over the past two decades in both places. Original residents have been progressively displaced from the areas preferred by foreigners, both in Puerto Vallarta and in the Ajijic area. Additionally, a consequence of gentrification has been the construction of housing and other buildings that no longer adhere to the typical architectural style of either destination, due primarily to the supply of new housing and the increased pressures of real-estate capital in this regard.

Table 15. Satisfaction with the following aspects of your dwelling (Arithmetic mean. Scale: 1 Very Dissatisfied to 10 Very Satisfied)

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Purchase price	7.05	8.54
Location	8.21	9.12
Space dimensions (size)	7.70	9.05
Architectural style	7.47	8.84

Continuing with the topic of housing, the survey asked expatriates about three additional aspects: satisfaction and safety, as well as with whom they share the dwelling. Satisfaction is important due to the conservation effects mentioned above, but also because it reinforces the appeal of both destinations and the rootedness of their foreign communities. To capture this dimension, we asked respondents to rate, on a scale from 1 to 10, four aspects: "Purchase price," "Location," "Dimensions," and "Architectural style."

Recall that just over half of expatriates in both sites are homeowners, and just under half (40%) are renters. When we asked about the "price," we included both tenure types. As shown in Table 15, satisfaction with the "price" is noticeably higher among foreigners in Ajijic/Chapala (with a mean of 8.54 on the aforementioned scale). The corresponding mean for Puerto Vallarta is 7.05. Overall, the level of satisfaction in both destinations is considerably high, although it is significantly higher in Ajijic/Chapala across all housing characteristics included

in Table 15—even now, when local housing demand appears to have increased to a greater extent there than in Puerto Vallarta.

Another important variable concerns perceived "safety" in the neighborhood where the dwelling is located (Table 16). In this case, the figures reverse in favor of Puerto Vallarta/BB. Those who state that the neighborhood is "very sure" total 62.9% in Puerto Vallarta, compared to 44.6% who report the same in Ajijic/Chapala. Although perceived "safety" is generally high in both destinations—since the combined options "very sure" and "Seguro" amount to 97.9% and 95.5%, respectively—Puerto Vallarta significantly surpasses the Ajijic area if one looks only at the "very sure" option. In a broader context marked by a generalized sense of insecurity in the country, it is noteworthy that this is not the case for expatriates residing in the destinations under study. It should therefore be noted that the sense of insecurity among the general population is far more attenuated in Puerto Vallarta/BB—and likely also along the lakeshore of Chapala—than in other regions of the state and the country.

Table 16. How safe do you feel the neighborhood where you live is?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Very safe	62.9	44.6
Somewhat safe	35.0	50.9
Not very safe	1.0	4.0
Not safe at all	0.3	0.3
DK/NA	0.8	0.3
Cases	383	399

In this section on housing, we included the question of "with whom the dwelling is inhabited" (Table 17). In both destinations, the majority live with a "partner": more so in Puerto Vallarta/BB, where 67.6% report this to be the case, whereas in Ajijic/Chapala the figure is 55.9%. Conversely, those who live "alone" account for 14.4% in Puerto Vallarta/BB, while in Ajijic/Chapala the proportion rises to double that, at 30.3%.

Table 17. With whom do you live in:

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Alone	14.4	30.3
With partner	67.6	55.9
With family	11.7	6.0
With friends	2.9	5.0
Other(s)	1.6	2.0
N/A	1.9	0.3
Cases	383	399

Finally, given that this population is composed fundamentally of older adults, the issue of health and access to related services is, of course, of crucial importance. For this reason, the variables analyzed succinctly below were included in this study.

It is foreseeable that expatriate communities in both Puerto Vallarta/BB and Ajijic/Chapala would need to use medical services (Table 18). However, these services have not been used in the same proportion. Among expatriates in Puerto Vallarta/BB, 58.5% have resorted to them, whereas in Ajijic/Chapala a significantly higher 84.2% have done so. We are speaking of a difference of 26 percentage points. This difference is to be expected, since, as noted earlier, permanent residents in Ajijic account for 68.2%, while in Puerto Vallarta they amount to only 18%, in addition to the higher average age in Ajijic/Chapala. Nonetheless, it should also be noted that, in both cases, the number of those who turn to local medical services exceeds the number of permanent residents. This means that part of the *snowbirds'* seasonal residents) also use these services in both localities, and that the so-called "Medical Tourism" is an important and growing factor in them, especially in Puerto Vallarta.

Table 18. Have you needed medical services in…?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
No	40.5	15.8
Yes	58.5	84.2
NR/DK	1.1	-
Cases	383	399

Table 19. How do you handle your health matters in Mexico?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
I have IMSS/Public Health Insurance	5.5	13.8
I have private health insurance	55.7	36.8
I pay for private medical services out of pocket	42.8	72.4
I rely on my country's National Health Program	16.5	17.8

The combination of type of residence with income as an intervening variable also helps explain the differences shown in Table 19 regarding "how expatriates handle their health care needs" in each locality. As can be observed, expatriates who "have private health insurance" constitute the majority in Puerto Vallarta/BB, at 55.7% (versus 36.8% in Ajijic), whereas those who "pay for private medical services out of pocket" form a larger majority in Ajijic/Chapala, at 72.4% (versus 42.8% in Puerto Vallarta). Column totals in Table 19 do not sum to 100 because the options are not mutually exclusive: one may hold private insurance and at times pay providers directly or rely on the "National Health Program in one's country of origin," as is particularly the case for Canadians.

These services are, as noted, important factors in destination choice, alongside cost of living, air connectivity, communications, and climate, given that this is a form of *retirement* migration composed—especially in Ajijic/Chapala—of retirees and pensioners. Correspondingly, both the quality and cost of services, and how both are evaluated, are relevant.

It is inferred that the quality and cost of medical and hospital services are overdetermined by the type of specialized care required by older adults (*Baby Boomers*), the predominant age groups among expatriates, particularly those composed largely of retirees and pensioners. Put differently, such services are more expensive, and it is more difficult to guarantee their quality because they predominantly address ailments associated with old age. It is therefore pertinent to examine the level of competitiveness these services achieve in a complex and demanding market.

Tables 20 and 21 present responses to questions about the "quality" and "costs" of several elements of the local medical offering in Puerto Vallarta/BB and Ajijic/Chapala. For clarity, we focus on the effective cases, whose figures are shown in the last two rows of each table (excluding "No Responses" and cases marked "Not applicable").

We observed that while 58% have used local medical services in Puerto Vallarta/BB, 84% have done so in Ajijic/Chapala (Table 18). This 26-percentage-point difference is again explained by the higher number of "permanent residents" and the higher average age in the latter (68%), whereas in the former, medical tourism would appear to be significant, given the predominance of "seasonal residents" (64%).

Table 20. Opinion on the quality of medical services

	Quality of Nurses		Quality of Doctors		Quality of Hospitals/ Clinics	
	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Poor	0.5	-	0.3	0.3	-	-
Fair	1.6	5.5	1.6	2.0	1.6	4.5
Good	13.1	29.6	16.4	21.6	15.1	29.1
Excellent	33.9	38.3	40.5	59.9	35.5	40.4
No Response/ No Answer	32.9	-	30.5	-	31.6	-

	Quality of Nurses		Quality of Doctors		Quality of Hospitals/ Clinics	
	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Not Applicable	18.1	26.6	10.7	16.3	16.2	26.1
Cases	383	399				
Efective Cases						
Excellent	65.0	52.3	67.6	71.7	68.3	54.8
Good	25.2	40.4	27.3	25.8	29.0	39.4

Table 21. Opinion on the cost of medical services

	Cost of Doctors		Cost of Hospital/Clinic	
	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Poor	0.3	0.8	0.5	0.5
Fair	2.9	5.5	2.9	5.5
Good	18.5	32.1	15.4	32.3
Excellent	35.0	44.1	28.5	29.8
Not Applicable	12.3	17.5	19.6	31.8
Missing	31.1	-	32.6	-
Efective Cases				
Excellent	62.0	53.4	59.6	43.7
Good	32.8	38.9	32.2	47.3

In both cases, we may assume a high prevalence of metabolic and chronic-degenerative diseases, though somewhat higher in Ajijic/Chapala, given that the average age (70 years) is also higher than in Puerto Vallarta (64 years).

Broadly speaking, a quick review reveals a high degree of satisfaction with the medical elements included in Tables 20 and 21 (“Nurses,” “Doctors,” and “Clinics/Hospitals”), since their “quality” and “costs” are assessed more than positively.

With regard to “nurses,” 65% in Puerto Vallarta/BB rate them as “excellent,” while a smaller share, 52.3%, does so in Ajijic/Chapala. However, when adding the “good” and “excellent” options, the figures for Puerto Vallarta/BB are 90% and for Ajijic/Chapala 92.4%. These are, as can be seen, very significant numbers.

The assessment of “doctors” is similar in Puerto Vallarta/BB: 67% rate them as “excellent” (and when combined with the “good” category, the total reaches 94%). Yet this evaluation is higher in Ajijic/Chapala, where as many as 71.7% consider them “excellent” (and, when added to the “good” option, this yields 97.5% positive responses). Regarding the “costs” of services provided by “doctors,” although these are also evaluated positively, they are rated less favorably than quality in both localities—slightly less so in Puerto Vallarta/BB, where the “excellent” option totals 62%, and significantly less so in Ajijic/Chapala, where “cost” is considered “excellent” by 53.4% of respondents.

Opinions on the “quality” and “costs” of “Hospitals/Clinics” follow roughly the same pattern. Both quality and costs are evaluated more favorably in Puerto Vallarta/BB than in Ajijic/Chapala. Sixty-eight percent consider the quality of hospital services “excellent” in Puerto Vallarta, compared to 54.8% in Ajijic. Costs are rated “excellent” by 59.6% of respondents in Puerto Vallarta, and by 43.7% in Ajijic.

If we consider only the “excellent” option, the overall assessment of the “quality” of all medical services averages 67% in Puerto Vallarta, while “costs” receive an “excellent” rating averaging 61% in the same locality. The “excellent” quality of the same services averages 59.6% in Ajijic/Chapala, whereas “excellent” costs amount to an average of 48.5%. As can be seen, both quality and costs are evaluated more favorably in Puerto Vallarta than in Ajijic, and in both localities quality is rated more highly than the costs of “medical services.” In other words, they are considered good, but somewhat expensive.

CHAPTER 4.

Sociocultural profile of expatriates, well-being, and social capital in Puerto Vallarta / Bahía de Banderas and Ajijic / Chapala

Why each destination is chosen recreational options, lifestyles, and social capital

The reasons why foreign migrants choose Mexican destinations have been listed in numerous studies on the subject and, of course, have also been extensively discussed (Geo-Mexico: 2012; n.p.). Our study likewise investigates the reasons cited by the foreigners we interviewed in the Ajijic/Chapala area and in Puerto Vallarta/Bahía de Banderas. In general terms, there is convergence between some of the most important issues mentioned in other works and the results of our survey. The differences appear in the order of importance assigned to each reason for residing in the areas under study, both when comparing our survey with other studies and when contrasting the order assigned within each of the populations included in our research.

Table 22. Which of the following reasons mattered for choosing? Ajijic / Ribera de Chapala for seasonal or permanent residence, and what level of importance do you assign on a 1–10 scale?

	Mentions	Importance
Climate	97.7	8.93
The culture and customs of Mexico	96.5	8.23
Treatment by local people	93.7	8.05
Beauty of the natural landscape	96.2	7.99
Cost of living	96.0	7.96

	Mentions	Importance
The tranquility with which one can live	93.5	7.85
The original lifestyle of Ajijic/Chapala	94.0	7.65
Proximity to the international airport	95.0	7.65
Atmosphere of diversity and tolerance	94.2	7.61
The pueblito	94.7	7.51
Mexican and international cuisine	93.7	7.30
Artistic and cultural activities in Ajijic/Chapala	93.7	7.26
Close relationships with friends and others	93.0	7.16
Variety and cost of medical and hospital services	92.7	6.81
Cost of housing and real estate	92.5	6.80
Proximity to Guadalajara	92.2	6.67
Variety of entertainment options	93.2	6.31
Diversity of consumer options	90.2	6.09
Proximity to one's country of origin	89.0	6.01
Ease of access to financial services	90.2	5.71
Participation in voluntary associations	88.2	5.69
The region's pueblos mágicos	87.7	5.44
Immigration facilities	86.7	5.36
Participation in expatriate clubs	84.0	4.71
Hot springs	82.7	3.94
Access to one's own religious activities	71.2	3.29

Table 23. Which of the following reasons mattered for choosing Puerto Vallarta/Bahía de Banderas for seasonal or permanent residence, and what level of importance on a 1–10 scale?

	Mentions	Importance (Mean)
Weather	99.7	9.31
Beauty of the landscape	96.6	8.56
The culture and customs of Mexico	95.8	8.39
Treatment by the local population	92.4	8.00
The original lifestyle in Puerto Vallarta	90.3	7.80

	Mentions	Importance (Mean)
The tranquility in which one can live	92.4	7.78
Cost of living	92.2	7.25
Artistic and cultural activities in PV	89.8	7.20
Atmosphere of diversity and tolerance	88.8	7.12
Mexican and international food	90.9	6.98
The pueblito	88.3	6.86
Variety of entertainment options	88.0	6.62
Diversity of consumer options	86.2	6.11
Proximity to one's country of origin	89.3	5.95
Cost of housing and real estate	83.6	5.91
Annual arrival of whales	87.5	5.75
Ease of access to financial services	85.1	5.73
Variety and cost of medical and hospital services	83.0	5.72
The region's *pueblos mágicos*	83.3	5.60
Nightlife	85.1	5.22
Immigration facilities	81.5	4.70
Participation in voluntary associations	79.6	4.36
Participation in expatriate clubs	75.2	3.69
Films shot in PV	80.7	3.62
Access to one's religious activities	74.9	3.46
Close relationships with friends and other people	89.0	7.12

Additionally, we consider here the activities and entertainment options preferred by members of both communities—a variable that also reveals interesting differences in the lifestyles of the respective expatriate populations.

It is therefore appropriate to continue reviewing the survey results on these topics.

Tables 22 and 23 report the lists of reasons for choosing each place as a destination. In general, the lists coincide, but they differ in some items due to the distinct configuration of each physical, social, and cultural space. In both cases, it is a list of 26 reasons, with the record of mentions plus the level of importance assigned to each on a 1–10 scale.

Table 24 lists the 10 principal reasons for choosing each destination, with 9 of them overlapping among those mentioned in the top ten, albeit in a different order. In the first four positions, both destinations place "weather " first, followed—though in a different order—by "The culture and customs of Mexico", "Treatment by local people", and "Beauty of the natural landscape". Of primordial relevance, then, are two geographic and natural characteristics in both places, accompanied by two sociocultural traits. Additionally, in both locations "tranquility" of life ranks sixth, and the "atmosphere of diversity and tolerance" ranks 8th in Puerto Vallarta/Bahía de Banderas and 9th in Ajijic/Chapala. It is noteworthy that a reason frequently cited as the most important in the literature we have already discussed—"cost of living"—appears in fifth place in Ajijic/Chapala and seventh in Puerto Vallarta/Bahía de Banderas. This would suggest that, while economic reasons are important for migration to both destinations in Jalisco, they carry less weight than other factors more closely related to *quality of life.*

Table 24. Important reasons for choosing Puerto Vallarta / Bahía de Banderas or Ajijic / Ribera de Chapala as a preferred destination XX and XX

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala	
	(Mean) Importance	Rank	Importancia (Media)	Rank
Importance	9.31	1	8.93	1
The culture and customs of Mexico	8.39	3	8.23	2
The treatment by the local population	8.00	4	8.05	3
The beauty of the natural landscape	8.56	2	7.99	4
The cost of living	7.25	7	7.96	5
The tranquility with which one can live	7.78	6	7.85	6
The distinctive lifestyle of the place	7.80	5	7.65	7
Proximity to the international airport	-	-	7.65	8
The atmosphere of diversity and tolerance	7.12	8	7.61	9
The "pueblito" (historic town center)	6.86	10	7.51	10
Mexican and international cuisine	6.98	9	-	-

It may *be assumed* that the cost of living is a primary motivation, but that its importance is relatively relegated by other factors of various kinds, because when expatriates migrate they take for granted that this cost is low and therefore affordable, which allows them to comparatively value other equally relevant reasons more highly.

The information that respondents receive about the characteristics of the destinations analyzed here comes from different sources and flows through various channels of communication (Table 25). A revealing finding in this regard is that the principal source is "friends" in both Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala, although the proportion is higher in the former (55.6%) than in the latter (48.4%). In effect, the important point is that in about half of the cases (slightly more or slightly less) communication is person-to-person (interpersonal) and, more specifically, among friends and acquaintances. The greatest difference lies in the second most important source of information: the "internet" in the case of Ajijic/Chapala, with 29% of mentions, whereas in Puerto Vallarta/Bahía de Banderas it is "travel agencies" (with 19% of mentions).

Table 25. How did you learn of Ajijic's existence as an attractive destination?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Through friends	55.6	48.4
Travel agency	9.9	1.0
Internet	6.5	28.8
Social Media	1.8	1.3
Press promotion	0.8	3.0
A film or films	1.8	-
Other	21.4	17.0
Cases	375	399

In an initial reading of these data, one may say that the choice of a migration destination typically passes through the filter of social networks; in this case, the networks of friends and acquaintances of expatriates (family, workplace, neighborhood), or membership in a voluntary association (Rotarians, American Legion, political party, church, etc.). These are *Migration Networks*, or what

may be termed *Transnational Families* (Vásquez, 2019). In this sense, the possibility of maintaining ongoing consanguineous, filial, or friendship ties—and *cultural* and *political affinities*—alongside the new bonds established with other compatriots or with the local population must carry some weight. Moreover, this facilitates more rapid adaptation to the destination and strengthens relationships of coexistence that are important when forming or joining voluntary associations for cultural, recreational, or philanthropic purposes.

To continue with this point, we next present an extensive inventory of activities that expatriates might engage in at the chosen migration destination. These activities are, logically, also related to the reasons for selecting one of the destinations as a place of seasonal or permanent residence.

At the outset, it should be noted that, given the average age of members of the expatriate communities in Ajijic/Chapala and Puerto Vallarta/Bahía de Banderas, the predominant daily and leisure activities are those suited to the physical conditions typical of the *Baby Boomers*, and to the lifestyle consistent with that. They also reflect some of the differences inherent in the social and spatial configuration of each of the two destinations.

Table 26. Recreational and Entertainment Activities in Ajijic/Chapala

	1) Very often	2) Often	1)+2)	Occasionally/ never
Read books	50.4	25.8	76.2	23.1
Dine at restaurants	44.4	34.1	78.5	20.3
Walk around town	42.1	30.3	72.4	25.1
Watch television at home	40.6	26.6	67.2	30.5
Listen to music at home	39.6	32.6	72.2	26.3
Visit local markets	33.8	38.1	71.9	26.9
Meet up with friends or family	33.8	38.1	71.9	26.1
Go to the lake	20.5	30.3	50.8	58.7
Go to the gym, practice yoga, meditation, etc.	19.3	18.5	37.8	59.1
Swim in a pool	15.0	12.4	27.4	72.7

	1) Very often	2) Often	1)+2)	Occasionally/ never
Attend public events (parades, festivals, etc.)	15.0	30.6	45.6	51.2
Play golf, tennis, or a similar sport	11.0	6.3	17.3	79.5
Visit nearby places	10.3	28.8	39.1	57.4
Go hiking	9.8	14.0	23.8	72.9
Go to church or attend religious activities	9.5	8.5	18	78.2
Go to the spa, receive massages	9.3	11.3	20.6	76.2
Attend fundraising festivals	9.0	24.6	33.6	63.2
Visit local tourist attractions	8.8	26.8	35.6	61.6
Attend the cinema or theater	7.8	18.8	26.6	70.4
Visit a bar	7.3	13.5	21.8	75
Attend religious festivities	6.5	9.5	16	79.7
Participate in water sports	4.3	3.0	7.3	86.2
Ride a bicycle	4.0	6.0	10	84.7
Other activities	3.5	1.3	4.8	2.8
Go to the hot springs	2.0	7.0	9	84.2
Participate in extreme mountain sports	1.5	1.5	3	92.7
Go fishing	0.8	2.3	3.1	23.1

Considering first the activities carried out “Very frequently,” we observe that at the highest level in Ajijic/Chapala “Read books” appears with 50% of responses among respondents, whereas in Puerto Vallarta “Read books” ranks fourth, with a corresponding figure of 39.4%—that is, a difference of 10 percentage points. If the options “Very frequently” and “frequently” are combined, the Lakeshore of Chapala yields 76.2% of people who habitually read books as a primary activity, compared to 67.9% who do the same in Puerto Vallarta/BB (a slightly smaller difference of 8.3 percentage points). As might be supposed, it is

quite likely that the foregoing is explained, in part, by the relatively higher level of schooling among expatriates living in Ajijic/Chapala (Tables 26, 27).

Table 27. Recreational and Entertainment Activities Puerto Vallarta / Bahía de Banderas

	1) Very frequently	2) Frequently	1)+2)	Occasionally / Never
Walk around town	49.1	28.5	77.6	19.6
Dine at restaurants	46.5	33.9	80.4	18.5
Meet with friends or family	40.2	32.1	72.3	25.6
Read books	39.4	28.5	67.9	30.3
Visit local markets	36.6	40.7	77.3	20.9
Go to the beach	31.6	29.0	60.6	38.2
Listen to music at home	27.7	31.6	59.3	38.9
Swim in the pool	26.4	26.9	53.3	45.9
Visit bars	25.3	20.9	46.2	36.3
Watch TV at home	23.5	25.1	48.6	49.3
Enjoy local tourist attractions	19.1	33.7	52.8	45.1
Visit nearby places	18.5	31.1	49.6	46.8
Attend public events (parades, festivals)	17.8	28.5	46.3	51.1
Go to the gym; practice yoga, meditation	15.9	14.1	30	67.1
Attend religious activities	9.4	5.2	14.6	80.2
Go hiking	8.9	13.1	22	74.7
Do water activities and sports	8.6	7.8	16.4	77.3
Go to the movies or theater	8.6	14.9	23.5	73.9
Attend fundraising festivals	8.1	14.9	23	73.6
Attend religious festivities	7.3	7.6	14.9	81.7
Play golf, tennis, or a similar sport	7.0	5.5	12.5	82.5
Go to the spa; receive massages	5.7	11.5	17.2	80.4

	1) Very frequently	2) Frequently	1)+2)	Occasionally / Never
Ride a bicycle	5.2	5.7	10.9	84.8
Other activities	5.0	1.8	6.8	11.5
Participate in extreme mountain sports	3.7	2.1	5.8	90.6
Go fishing	3.4	4.4	7.8	19.6

Broadly speaking, there is overlap in some of the first eight activities carried out "frequently" and "very frequently" in both places. What changes is their order of priority. Ordering them by the responses "Very frequently," in Ajijic/Chapala they are, in this order: "Read books," "Dine at restaurants," "Walk around town," "Watch TV at home," "Listen to music at home," "Visit local markets," "Meet with friends or family," and "Go to the lake." In Puerto Vallarta/BB, the order is as follows: "Walk around town," "Dine at restaurants," "Meet with friends and family," "Read books," "Visit local markets," "Go to the beach," "Listen to music at home," and "Swim in the pool." It is understood that, in general, activities requiring physical effort and skill are those undertaken only "occasionally" or "never." Going to the lake and swimming in the pool are less frequent activities in Ajijic/Chapala, which is not difficult to explain given the nature of Puerto Vallarta as primarily a sun-and-beach destination.

Looking a bit more closely, among the first five "very frequent" activities in Ajijic/Chapala, three are of a "private" nature and two involve social interaction and "socialization," whereas in Puerto Vallarta/BB four involve "socialization" and only one is of a "private" nature. One might say this nuance combines the lifestyle factor with the characteristics and attractions each place offers. In another sense, in Ajijic/Chapala private at-home activities predominate—such as reading, watching TV, and listening to music—because its "touristic" profile is more muted while it predominates as a "retirement" location.

In particular, the entertainment option "Listen to music at home" ranks fifth in frequency among expatriates in Ajijic/Chapala and seventh among their counterparts in Puerto Vallarta/BB. In this regard, it is worth asking about the musical tastes and preferences of both populations and seeing whether perceptible diffe-

rences exist. To that end, Table 28 lists a series of musical genres and reports the most frequently mentioned genres (out of three possible mentions).

Table 28. Preferred musical genres by locality

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Classical music	28.7	45.6
Rock	51.7	40.1
Jazz	24.3	36.8
Mexican music	37.1	35.1
Blues	37.6	27.6
Pop	25.8	22.1
Country music	21.4	17.0
Other	3.9	11.5
Opera	5.2	9.8
Alternative	7.3	9.3
Latin American folklore	7.8	9.0
Boleros	4.2	3.5
Electronic music	2.9	2.3
Heavy metal	2.1	1.8
Hip Hop	1.3	1.0
Rap	1.6	0.3
Salsa–Tropical rhythms	30.5	-

Totals do not sum to 100 because up to three genres could be selected per respondent.

The top position by number of mentions (51.7%) is occupied by “Rock” among foreigners in Puerto Vallarta/BB, whereas among foreigners in Ajijic/Chapala the top spot is held by “Classical music” (45.6%). Conversely, “Classical music” ranks fourth among residents of Puerto Vallarta/BB (28.7%), while “Rock” ranks second in Ajijic/Chapala (40.1%). The difference in listenership for classical music is notable, reaching 17 percentage points higher in Ajijic/Chapala than in Puerto Vallarta/BB.

In third place in Puerto Vallarta/BB is “Blues,” whereas in Ajijic/Chapala the third position is occupied by “Jazz” “Blues” is in fifth place among foreigners in Ajijic/Chapala, while “Jazz” ranks sixth among residents of Puerto Vallarta/BB. It is noteworthy that *Mexican music* holds the fourth position in Ajijic/Chapala and the third in Puerto Vallarta/BB.

These musical preferences, while broadly aligned, nonetheless reveal an interesting difference between the two communities—a cultural nuance that would suggest, in this respect, a somewhat greater degree of sophistication among foreigners residing in Ajijic/Chapala. This is corroborated by their preferences in cinematic consumption.

Moreover, the five most frequently mentioned film genres in Puerto Vallarta/BB are, in order of precedence, “Comedy”, “Drama”, “Action”, “Adventure”, and “Mystery. In Ajijic/Chapala, the most frequently mentioned are, in that order”, “Drama,” “Comedy”, “Historical Cinema”, “Mystery”, and “Action”. The predominance of “Drama” and, in third place, “Historical” in Ajijic/Chapala marks another differentiating nuance, especially considering that in Puerto Vallarta/BB “Action” ranks third, followed by “Adventure.” In most of the remaining genres there are no marked differences, except for “Political cinema, which in Ajijic/Chapala receives 8.8% of mentions versus 5.5% in Puerto Vallarta/BB; or the “Western,” which is mentioned by 5.5% of respondents in Puerto Vallarta/BB, compared to 3% in Ajijic/Chapala (Table 29).

Table 29. Preferred film genres by locality

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Drama	35.8	45.1
Comedy	51.7	42.1
Historical	22.7	37.1
Mystery	24.8	31.1
Action	35.8	24.1
Adventure	26.4	22.6
Romance	17.2	17.5
Science fiction	11.2	13.0

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Crime	12.0	10.5
Musical	9.4	10.3
Thriller	12.0	9.8
Political	5.5	8.8
Other	2.1	7.5
Satire	-	5.3
Fantasy	5.5	3.8
Animation	2.9	3.3
Western	5.2	3.0
Saga	3.7	1.8
Horror	2.1	1.3

Subjective well-being

Given that migration to Ajijic/Chapala consists predominantly of retirement migration and that a similar (though minority) form of migration in Puerto Vallarta/BB is accompanied by a majority of seasonal residents, in either case the move is to tourist destinations—sun-and-lake in the former and sun-and-beach in the latter—so residence, whether permanent or temporary, is by definition something to be enjoyed. There is broad consensus that expatriates' quality of life improves substantially, with better conditions of tranquility and well-being thanks to the lower cost of living, the attractions of the natural environment, the benevolent temperate climate, the enjoyment of a stimulating cultural diversity, and the affable treatment received from host populations. It is therefore appropriate at this point to inquire into the overall degree of subjective well-being perceived and experienced by expatriates in both communities—a well-being to which the conditions of the destination contribute decisively, in addition to subjective factors that do not directly depend on those conditions. To measure it, we employ two complementary variables: the feeling of *Happiness* and the degree of *Satisfaction with Personal Life*.

Regarding the first variable, if we consider all expatriates interviewed (Table 30), we find that in Puerto Vallarta/BB, 64.2% consider themselves "Very happy,"

a rather high figure. A further 30.5% consider themselves "Happy"; thus, if we add the two categories, "Very happy/Happy" amounts to 94.7%, that is, nearly all expatriates in Puerto Vallarta/BB. In this instance, among expatriates in Puerto Vallarta/BB the intensity of the feeling of happiness is greater than among their counterparts in the Ajijic/Chapala area, where 55.3% consider themselves "Very happy." The combined total of "Very happy" and "Happy" is 91.9%—also close to the entirety of expatriates, but slightly lower than in Puerto Vallarta.

Table 30. Considering all things, would you say you are

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Very happy	64.2	55.3
Happy	30.5	36.6
Somewhat happy	4.4	7.2
Not happy	0.3	0.4
Cases	383	399

Comparing this variable by expatriate nationality yields noteworthy results. To begin with, there are no substantial differences between expatriates from the United States and those from Canada. In Puerto Vallarta/BB, 66.7% of U.S. nationals consider themselves "Very happy," while 63.9% of Canadians report the same. The combined share for "Very happy/Happy" is 96% for the former and 94% for the latter. In Ajijic/Chapala, 59% of U.S. nationals consider themselves "Very happy," compared to 55.2% among Canadians. The combined share for "Very happy/Happy" is 91.9% for the former and 94.6% for the latter (Table 31).

Table 31. All things considered; would you say you are

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala	
	EU	Canadá	EU	Canadá
Very happy	66.7	63.9	59.0	55.2
Happy	29.9	30.1	32.9	39.4
Somewhat happy	2.7	5.6	7.7	4.4
Not happy	0.7	0.5	-	0.9
Total Cases	383		399	

Table 32. All things considered; would you say that you are:
WVS. Selected samples: Canada 2020, USA 2017.

	Canadá	United States
Very happy	19.5%	28.4%
Quite happy	65.4%	59.8%
Not very happy	13.3%	10.2%
Not at all happy	1.8%	1.4%
Don't know	-	0.0%
No answer	-	0.2%
(N)	(4,018)	(2,596)

On the other hand, when expatriates in the two communities are compared with the population over 16 years of age in their respective countries, both groups are considerably happier than their compatriots (Table 32). In the United States, 28.4% consider themselves "Very happy", and in Canada only 19.5% (WVS, Table 28). Adding these to the "Happy" category, the corresponding figure is 88.2% in the United States and 84.9% in Canada. The gap in the "Very happy" option between U.S. expatriates in Puerto Vallarta/BB and their compatriots in the United States is 38 percentage points higher; likewise, it is 35 percentage points higher for expatriates in Ajijic/Chapala than for U.S. residents in the United States. Among Canadians, this same gap is 44 percentage points in Puerto Vallarta/BB relative to the population of Canada (aged 16+), and 40 percentage points higher in the case of Ajijic/Chapala. In short, Americans and Canadians who reside permanently or seasonally in these two Mexican communities are *much happier* than their compatriots residing in their respective countries of origin. We reiterate: they are not the only ones, but the reasons for choosing one of the two destinations, the conditions they offer, and the quality of life experienced there appear to be the factors that make Americans and Canadians much happier in Puerto Vallarta/BB and Ajijic/Chapala than their compatriots living in the United States and Canada.

The feeling of *happiness* is perhaps the most important element among the emotions and passions associated with *subjective well-being*. Another involves

feelings of *satisfaction* regarding a multiplicity of aspects of one's personal life (work and profession, the couple relationship, family ties, economic situation, housing conditions and household coexistence, friendships, social and political affiliations, etc.) (Table 33). We assume that the balance of all these matters (and others) results in an overall, aggregated perception of *satisfaction with one's personal life*, which varies to different degrees.

To further flesh out the picture of well-being experienced by expatriates in Puerto Vallarta/BB and Ajijic/Chapala—where residence in these communities would contribute greatly in that sense—we posed the following question: "All things considered, how satisfied are you with your life these days?" We used as a measurement instrument a *semantic differential scale ranging* from 1 ("Completely dissatisfied") to 10 ("Completely satisfied"). The corresponding results are shown in Tables 33 and 34, to which Table 35 is added, the latter containing data taken from the World Values Survey applied in the United States in 2017 and in Canada in 2020.

Table 33. Satisfaction with personal life by locality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
1 Completely dissatisfied	1.6		1.2	
2	0.8		1.0	
3	0.3		0.8	
4	0.8		0.6	
5	1.6		2.0	
6	0.8		1.8	
7	7.3		10.4	
8	19.1		25.6	
9	30.3		29.5	
10 Completely satisfied	36.3		26.1	
Average	8.59		8.36	
	EU	Canadá	EU	Canadá
	8.70	8.54	8.49	8.31
Cases	383		399	

As can be readily observed, the feeling of *Satisfaction with personal life*, measured on the aforementioned scale, is at levels close to the highest point and approaching the response "Completely satisfied" in both expatriate communities. The arithmetic mean offers the first piece of evidence for this. The average degree of *Satisfaction* in Puerto Vallarta/BB reaches 8.59, while in Ajijic/Chapala it is 8.31. They are, respectively, 1.4 and 1.6 points away from the maximum value on the scale (10).

Table 34. Satisfaction with personal life by Locality and Nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
1 Completely dissatisfied	1.4	1.4	0.7	1.8
2	1.4	0.5	0.8	0.9
3	0.0	0.5	0.8	0.0
4	0.7	0.9	0.7	0.9
5	2.0	1.4	2.6	0.9
6	0.0	0.9	2.2	0.0
7	8.8	6.0	7.4	7.2
8	14.3	22.2	25.6	28.5
9	37.4	25.0	31.7	30.4
10 Completely satisfied	34.0	38.9	27.1	24.0
Average	8.70	8.54	8.49	8.31

Furthermore, no marked or statistically significant differences are observed between nationalities when the arithmetic mean is considered (Table 34). Americans in Puerto Vallarta/BB report an average life-satisfaction score of 8.70, compared with 8.54 among Canadians. In Ajijic/Chapala, the corresponding averages are 8.49 for Americans and 8.36 for Canadians. As in the case of reported happiness, expatriates in both locations are more satisfied with their lives than the general population aged 16 and older in the United States and Canada. The mean score in Canada is 7.27, while in the United States it is lower, at 6.97 (Table 35).

To examine in somewhat greater *detail overall life satisfaction* and contrasts by locality and nationality, we now consider the share of expatriates located at the highest end of the scale—points 9 and 10. By locality and nationality, we observe that in Puerto Vallarta/BB 71.4% of U.S. respondents fall into this top tier, compared with 63.9% of Canadians (seven percentage points less). In Ajijic/Chapala, 58.8% of U.S. respondents are "Completely satisfied," while the corresponding figure for Canadians is 54.4%.

In this case, the percentage differences are somewhat more pronounced than the differences of only a few tenths of a point observed in the mean scores reported above (Table 34). In other words, Americans residing either temporarily or permanently in Puerto Vallarta/BB display a higher level of personal life satisfaction than their counterparts in Ajijic/Chapala—approximately 12 percentage points higher—and a substantially higher level than Americans in the United States as a whole. Only 27.1% of the latter report being completely satisfied, placing them approximately 44 percentage points below Americans in Puerto Vallarta/BB. Similarly, Canadians in Puerto Vallarta/BB report higher levels of satisfaction than their counterparts in Ajijic/Chapala—approximately 9 percentage points higher—and considerably higher levels than Canadians living in Canada. Among the latter, only 17.4% report being completely satisfied, approximately 41 percentage points below Canadians in Puerto Vallarta/BB.

Table 35. Life satisfaction in the United States and Canada

WVS. Selected samples: Canada 2020, USA 2017.

	Canadá	United States
10 Completely satisfied	4.8%	10.5%
9	12.6%	16.6%
8	27.5%	27.0%
7	23.3%	17.8%
6	13.1%	8.6%
5	8.0%	9.3%
4	5.1%	4.3%
3	3.1%	2.7%

	Canadá	United States
2	1.3%	1.4%
1 Completely dissatisfied	1.2%	1.2%
No response	-	0.7%
(N)	(4,018)	(2,596)
Mean	6.97	7.27
Cases	(4,018)	(2,579)

Recapping, while the differences regarding feelings of happiness are not substantial, life satisfaction does reflect somewhat significant differences by locality and nationality—and very significant differences, both in the degree of happiness and in the degree of satisfaction—between Canadian and U.S. expatriates residing in Puerto Vallarta/BB and Ajijic/Chapala, and between them and their respective compatriots in the United States and Canada.

Trust, associational life, and philanthropic activities

The communities analyzed in this study may be classified as transnational communities insofar as they bring together individuals of different nationalities, including members of the host population. Based on the information examined thus far, two characteristics may be identified. First, the predominant nationalities are American and Canadian, and members of both groups coexist with Mexicans in the two communities. Second, this coexistence is more continuous in Ajijic/Chapala, given that a large majority of expatriates—68.2%—reside permanently along the shores of Lake Chapala. By contrast, only 24.0% reside permanently in Puerto Vallarta/BB, while 62.4% live there seasonally each year. This means that sustained interaction occurs with slightly less than one-quarter of the expatriate population, whereas interaction with approximately two-thirds of that population is seasonal and concentrated during the high season.

Regardless of these differences, the quality of relations among expatriates, and between expatriates and Mexicans, depends on certain attitudes and values that are important in this regard. The most relevant one considered in this study is “interpersonal trust,” understood as the principal foundation of harmonious

coexistence, cooperation, associational life, and, in sum, *social capital* (Putnam, 2003; Simo, Herzog, and Fleerackers, 2013).

It should first be noted that levels of interpersonal trust among expatriates in both locations may be described as moderately high to high (Table 36). Trust is high in Puerto Vallarta/BB, where 63.2% believe that "most people can be trusted," and even higher in Ajijic/Chapala, where 70.4% share this view. To place these figures in perspective, it is worth recalling that only 10.5% of Mexicans agree with the statement that "most people can be trusted" (WVS, 2018), as do only 10.4% of residents of Jalisco (Cortés, 2019). Although the difference between the foreign communities of Ajijic/Chapala and Puerto Vallarta/BB is noteworthy—7.2 percentage points in favor of the former—the contrast between both foreign communities, on the one hand, and Mexicans and residents of Jalisco, on the other, is striking. The difference is approximately 60 percentage points in the case of Ajijic/Chapala and 53 percentage points in the case of Puerto Vallarta/BB.

Table 36. Speaking in general terms, do you believe that most people can be trusted, or that one must be very cautious when dealing with people?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Most people can be trusted	63.2	70.4
It is necessary to be very careful with people	32.1	26.1
DK/NA	4.2	3.5
Cases	383	399

The contrast in levels of interpersonal trust is not only observed vis-à-vis the Mexican population; although smaller, it is also evident when comparing the values of Canadian and U.S. expatriates at each destination (Table 37) and with those of their respective countries (Table 38). *U.S. nationals* in Puerto Vallarta/BB report a trust level of 68%, and those in Ajijic/Chapala, 71.3%. These figures are far higher than the level observed in the general *U.S. population, which reaches only 37%* (Table 31): a value 31 percentage points lower than that of Puerto

Vallarta/BB and 34 points lower than that of Ajijic/Chapala. Canadians in Puerto Vallarta/BB report a trust level of 61.4%, and those in Ajijic/Chapala, 72.3%, figures that exceed those observed in Canada (46.7%) by 15 and 25 percentage points, respectively.

Table 37. Speaking in general terms, do you think most people can be trusted, or that one must be very cautious when dealing with people?

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
Most people can be trusted	68.0	61.4	71.4	72.3
One must be very cautious with people	29.3	33.5	25.1	24.9
DK/NA	-	5.2	3.4	2.7
Cases	383		400	

Table 38. Speaking in general terms, do you think most people can be trusted or that one must be very cautious when dealing with people?

	Canadá	United States
Most people can be trusted	46.7%	37.0%
One must be very cautious with people	53.3%	62.5%
No answer	-	0.4%
(N)	(4,018)	(2,596)

WVS. Selected samples: Canada 2020, USA 2017.

Notwithstanding the substantial differences with Mexicans in particular, it should be remembered that among the aspects most highly valued by expatriates is “the treatment by local people”—the 3rd most important reason for choosing Ajijic/Chapala as a place of residence, and the 4th most important in Puerto Vallarta/BB. To explain this apparent dissonance, one might argue that the weakness of “interpersonal trust” among Mexicans and Jalisco residents is offset by other important values such as “empathy”, “cordiality”, “courtesy”, “affable treatment”, and “hospitality”.

This perception of the local population's treatment of expatriates is reinforced by the level of "agreement" expressed with one of the statements included in Tables 39 and 40: "I feel that I am welcome by the local population". This is the case for 95% of expatriates who are "in agreement" and "strongly in agreement" with the statement in Ajijic/Chapala, and for 91% in Puerto Vallarta/BB.

Table 39. Please indicate how much you agree or disagree with each of the following statements. Ajijic/Lake Chapala Region

Statement	Strongly disagree	Disagree	Undecided	Agree	Strongly agree	NS/NC
Most of my friends are other foreigners	6.5	18.0	3.5	37.3	33.6	1.0
Foreigners help to improve the community	1.8	5.5	16.5	44.9	30.1	1.3
I feel more comfortable doing business with other foreigners	27.3	32.1	19.8	14.0	4.3	0.3
I feel welcomed by the local population	1.0	-	3.8	29.1	65.9	0.3
I make an effort to be part of the local community	1.8	2.5	7.3	45.1	42.9	0.5
Some local people are resentful toward foreigners	19.3	23.1	24.3	26.6	5.0	1.8
Some Mexicans here have taken advantage of me	34.8	18.8	9.0	25.8	10.0	1.5
I have close friendships with at least one Mexican from here	9.5	8.8	6.5	25.1	49.9	0.3

Table 40. Please indicate how much you agree or disagree with each of the following statements. Puerto Vallarta/Bay of Banderas

	Strongly disagree	Disagree	Undecided	Agree	Strongly agree	NS/NC
Most of my friends are other foreigners	9.9	18.3	7.6	38.6	25.1	0.5
Foreigners help to improve the community	3.1	5.0	21.4	46.2	21.7	2.6

Statement	Strongly disagree	Disagree	Undecided	Agree	Strongly agree	NS/NC
I feel more comfortable doing business with other foreigners	17.2	26.6	26.6	18.0	7.3	4.2
I feel welcomed by the local population	2.1	1.3	3.7	22.5	68.9	1.6
I make an effort to be part of the local community	1.8	3.9	11.2	33.2	45.2	4.7
Some local people are resentful toward foreigners	28.7	22.7	22.2	17.8	4.7	3.9
Some Mexicans here have taken advantage of me	38.9	19.8	13.1	19.1	7.0	2.1
I have close relationships with at least one Mexican from here (friendship, romance)	11.5	7.6	6.5	22.7	48.8	2.9

Despite the fact that foreigners forge most of their friendships with other foreigners (70.9% in Ajijic/Chapala and 63.7% in Puerto Vallarta/BB) and feel that some Mexicans "have taken advantage of them" (53.6% in Ajijic/Chapala, 58.7% in Puerto Vallarta/BB), a generally positive attitude prevails in relations between Mexicans and expatriates. The statement "I make an effort to be part of the local community" elicits agreement from 88% of respondents in Ajijic/Chapala and 78.4% in Puerto Vallarta/BB. In parallel, 75% of expatriates in Ajijic/Chapala feel that "foreigners help the community," as do 67.9% of those in Puerto Vallarta/BB. Finally, 75% of expatriates in Ajijic/Chapala agree with the statement "I have close friendships with at least one Mexican," as do 71.5% in Puerto Vallarta/BB.

The assistance expatriates provide to both communities takes the form of diverse individual contributions, but also—crucially—through participation in associative channels that have been of significant importance for the development and well-being of the host populations. It is therefore necessary to turn to the survey evidence regarding expatriates' membership in different types of voluntary associations—another core component of social capital. –

Table 41. Membership in Organizations and Voluntary Associations
Where percentages do not total 100%, the difference is due to *Missing* cases.

	Puerto Vallarta/Bahía de Banderas			Ajijic/Ribera de Chapala		
	Active member	Inactive member	Does not belong	Active member	Inactive member	Does not belong
Labor union	3.9	10.7	81.5	2.0	4.3	89.5
Consumer organization	9.7	8.9	77.0	6.0	6.8	82.7
Self-help or mutual-aid group	12.0	10.2	73.4	11.0	8.3	75.9
Sports or recreational association	26.9	9.9	59.8	19.8	7.8	68.7
Church or religious organization	16.4	14.1	67.1	16.8	12.3	67.7
Environmental organization	13.3	12.3	71.0	13.5	15.3	67.2
Professional association	21.7	17.0	57.7	13.8	21.8	60.9
Arts, Music, or Educational organization	23.2	14.9	58.2	25.1	14.5	56.4
Expatriate club	13.6	6.3	55.9	34.1	15.3	46.9
Humanitarian or charitable organization	32.6	17.2	48.3	40.9	17.8	39.3
Other organization	4.4	2.6	17.8	2.3	0.8	8.3

The relevant information is presented in Table 41. The voluntary organizations with the fewest members (active and inactive) in both localities are labor unions, consumer organizations, self-help or mutual-aid groups, and environmental organizations, followed by sports or recreational associations and churches or religious organizations. Conversely, the associations with the largest membership in Ajijic/Chapala are humanitarian or charitable organizations (with 58.7% reporting membership), expatriate clubs (49.4%), and arts, music, or educational organizations (39.6%). In Puerto Vallarta, the highest members-

hip likewise corresponds to humanitarian or charitable organizations (49.8%), but the second and third positions are held by professional associations and arts, music, or educational organizations* (38.7% and 38.1%, respectively). Membership in expatriate clubs amounts to only 19.9% in Puerto Vallarta, compared with 49.4% in Ajijic/Chapala—a difference of 30 percentage points. This is a substantive difference, as clubs activate the potential for collaboration and alignment of interests among expatriates in Ajijic/Chapala, primarily in the cultural sphere. In general, *clubs* enhance the *agency* of members of the latter community, with deep and significant repercussions. A flagship example is the *Lake Chapala Society*, whose prominence in Ajijic—and across the lakeshore region—is beyond dispute.

It is worth highlighting humanitarian and charitable organizations, since in both communities they are the most participatory, with all the attendant benefits this implies for host populations. Likewise, it should be noted that in Ajijic/Chapala participation in this type of voluntary association is nine percentage points higher than in Puerto Vallarta/BB. The differences in participation in expatriate clubs should also be underscored (30 percentage points higher in Ajijic/Chapala). These gaps in both types of associations are very likely explained, once again, by the predominance of permanent residents in Ajijic/Chapala (slightly more than three-quarters of expatriates), compared with only about one-quarter in Puerto Vallarta/BB. The greater prevalence of expatriate clubs, in particular, has many consequences for the daily lives and the recreational and cultural options available to expatriates along the Lake Chapala shoreline.

Participation in humanitarian and charitable organizations does not exhaust the ways expatriates "help improve the community" in the two localities. One must also consider specific activities or practices—in this case, philanthropic activities in particular. Such activities have been carried out since the earliest days of the expatriate communities in Puerto Vallarta and Chapala by their first members.

Table 42. Do you participate in any philanthropic activity?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
No	53.5	16.0
Sí	44.1	83.7
NS/NC, Missing	2.3	0.3
Cases	383	399
If the answer is “Yes”:		
As an active participant	5.7	13.8
As a donor	26.9	29.1
Both	13.3	38.8
NS/NC, Missing	54.1	18.3
Cases	383	399

As shown in Table 42, philanthropy remains a consistent feature among expatriates in both locales, albeit at different magnitudes. When asked whether they engage in “any philanthropic activity,” 44.1% of respondents in Puerto Vallarta/BB answered in the affirmative, a share that is nearly half of that observed in Ajijic/Chapala, where participation reaches 83.7%—that is, 40 percentage points higher than in Puerto Vallarta.

CHAPTER 5.
Cultural Identity and Public Morality

To complete the sociocultural profile of expatriates residing, either temporarily or permanently, in Puerto Vallarta/BB and Ajijic/Chapala, we incorporated four additional analytical dimensions into the survey questionnaire: religiosity, views on abortion, attitudes toward same-sex marriage, and positions regarding the legalization of drugs. The variables and indicators used to measure these dimensions are detailed below, together with their respective results.

Before proceeding, it is important to note that cultural identity is significant because the strength of associative and cultural ties—and consequently the degree of group cohesion within each community—also depends upon it. In other words, cultural identity affects the respective level of social coalescence and the resulting capacity for collective action, or agency, which can generate both symbolic and material benefits for expatriates themselves as well as for the host populations.

Religiosity

Religious beliefs, attitudes toward religion, and other aspects of religiosity were also included in the survey. We maintain that religion constitutes an essential point of reference for beginning to delineate certain features of the cultural identity characteristic of expatriates in both Puerto Vallarta/BB and Ajijic/Chapala. In other words, examining the degree of religiosity is important not only because it is a meaningful identity-related characteristic in its own right, but also because it allows us to discern the extent of secularization in expatriates' beliefs and atti-

tudes across other dimensions of their cultural identity, as well as in their broader attitudes toward life and society.

Table 43. Do you belong to any religious denomination?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
No	61.3	66.7
Yes	38.0	32.6
DK/NA	0.8	-
Total Cases	383	396
%	100.0	

It may thus be asserted that the expatriate communities in both locations exhibit a high degree of moral and cultural secularization—put succinctly, a comparatively weak sense of religiosity. Beginning with "Belonging to a religious denomination," Table 43 shows that only about one-third of expatriates in Puerto Vallarta/BB (38%) and in Ajijic/Chapala (32.6%) report affiliation with a specific religious faith. Conversely, 61.3% in Puerto Vallarta/BB and 66.7% in Ajijic/Chapala do **not** belong to any religious "denomination." These figures are, at the outset, quite telling.

Table 44. Do you belong to any religious denomination? By locality and nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
No	58.9	61.6	63.6	69.5
Yes	40.4	37.0	35.1	30.5
DK/NA	0.7	1.4	1.2	-
Cases	383		400	

When the data are disaggregated by nationality and location (Table 44), the figures vary, although only slightly. Among Canadians, 37% belong to a religious group in Puerto Vallarta/BB, compared with 30.5% in Ajijic/Chapala. Among Americans, the corresponding proportions are 40.4% in Puerto Vallarta/

BB and 35.1% in Ajijic/Chapala. The percentages are similar for Canadians and Americans and differ only slightly from those observed among expatriates in both communities. Nevertheless, membership in a religious group is lower for both nationalities in Ajijic/Chapala.

Table 45. Which denomination do you belong to?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Roman Catholic	17.0	10.0
Protestant	11.2	9.0
Orthodox Christian (Russian, Greek, etc.)	0.5	0.3
Jewish	3.1	3.5
Muslim	0.3	-
Hindu	0.3	-
Buddhist	1.8	2.3
Other	5.7	7.8
None	60.1	67.2
Total Cases	383	399
%	100.0	

Considering the full sample, Table 45 disaggregates the list of religious denominations to which respondents belong. As shown, Roman Catholics predominate in Puerto Vallarta/BB at 17%, followed by Protestants at 11.2%; the remaining denominations account for 11.4%, a figure nearly identical to that of Protestants. In Ajijic/Chapala, Catholics also predominate (10.0%), followed by Protestants (9.0%), which narrows the gap between these two denominations relative to Puerto Vallarta. In this case, however, the aggregate of "other" religious denominations in Ajijic/Chapala (13.7%) exceeds the shares for both Catholics and Protestants. The evident conclusion is that, beyond a relatively small proportion of religious membership overall, there is notable dispersion across different faiths; in other words, a substantial pluralism prevails in this domain in Puerto Vallarta/BB, and it is even more pronounced in Ajijic/Chapala.

If we consider only the segment that DOES belong to a religion, the predominance of Catholics in Puerto Vallarta/BB becomes clearer, at 42.5% of cases. They are followed by Protestants at 28%, with the combined set of other denominations also at 28%. Thus, while religious pluralism is considerable, there is a certain Catholic predominance. The contrast with Ajijic/Chapala is instructive. In that locality, Catholics comprise 30.4%, followed by Protestants at 27.4%. Yet both Catholics and Protestants are clearly surpassed by the sum of other denominations, which reaches 41.9%. Consequently, in Ajijic/Chapala, first, overall religious affiliation is lower—by five percentage points compared to Puerto Vallarta/BB. Second, religious diversity is greater, both because the gap between Catholics and Protestants is smaller and because the aggregate share of other denominations is significantly higher than that of Catholics and Protestants. Finally, in both localities, the third-largest denomination is Jewish, albeit at a considerable distance behind Catholics and Protestants.

Affiliation with a church is the first important element of *religiosity*. Another is engagement in *key ritual* or *sacramental practices*, one of which is attendance at regular *religious services*—e.g., Mass. Table 46 reports the results for service (Mass) attendance among respondents. In many Judeo-Christian traditions, attendance once per week is a normative obligation. According to the data, 12.3% of expatriates in Puerto Vallarta/BB and 15.5% in Ajijic/Chapala attend services at least once a week (once or several times per week).

It is striking that service *attendance* does not align with church *affiliation*. In Puerto Vallarta/BB, 38% reported belonging to a religious denomination, yet only 12.3% attend services at least weekly. The same occurs in Ajijic/Chapala: 32.6% report church membership, but only 15.5% meet this latter obligation. In this respect, expatriates in Ajijic/Chapala are somewhat more observant than their counterparts in Puerto Vallarta/BB. Conversely, the shares reporting that they "never or practically never" attend services are virtually identical to the shares reporting no religious affiliation. In Puerto Vallarta/BB, 61.4% never attend services and 60.1% report no religious affiliation; in Ajijic/Chapala, 66.4% never attend and 67.2% report no affiliation.

Table 46. Aside from weddings and funerals, how often do you attend religious services?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
More than once a week	2.9	2.5
Once a week	9.4	13.0
Once a month	3.7	3.0
Only on holy days	9.1	6.3
Once a year	2.9	1.8
Less than once a year	7.3	5.8
Never/almost never	61.4	66.4
NC	3.4	-
Total Cases	383	394
%	100.0	

Although affiliation with a church does not necessarily correspond to the actual observance of believers' ritual obligations, it does appear to be related to the spiritual dimension of religiosity, so to speak. The two variables examined below seem to support this interpretation. First, respondents were asked how they viewed themselves, "regardless of whether or not they attend religious services." As shown in Table 47, 39.7% of expatriates in Puerto Vallarta/BB describe themselves as "a religious person," compared with 32.3% in Ajijic/Chapala. These figures are clearly almost identical to those concerning membership in a particular religious denomination. Religious affiliation thus appears to correspond to the spiritual experience of religiosity, although this applies to only approximately one-third of the expatriates in both communities.

Table 47. Regardless of whether you attend religious services or not, would you say you are:

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
A religious person	39.7	32.3
A non-religious person	41.5	42.6
A convinced atheist	12.3	19.3
Espiritual	2.9	-
Other	-	1.4
DK/NA	3.7	-
Cases	383	399

Before turning to the next variable—religious "spirituality"—it bears emphasizing that a majority (nearly two-thirds) of expatriates are not religious, whether in sentiment or in the practical observance of ecclesiastical duties. At this point, however, and speaking of the non-religious, it is useful to distinguish between those who consider themselves "a non-religious person" and those who identify as "a convinced atheist" (Table 47). In Puerto Vallarta/BB, 41.5% consider themselves non-religious, and 42.6% do so in Ajijic/Chapala. To these we must add those who see themselves as "convinced atheists": 12.3% in Puerto Vallarta/BB and 19.3% in Ajijic/Chapala. As can be seen, atheists in Ajijic/Chapala amount to one-fifth of respondents (seven percentage points above Puerto Vallarta/BB). Taken together, the non-religious and atheists comprise 53.8% in Puerto Vallarta/BB and 61.9% in Ajijic/Chapala. While not perfectly aligned, these proportions are quite close to the shares reporting no religious *affiliation*.

To further illustrate these claims, it is useful to compare the variables "considers oneself a religious person" and "a convinced atheist" in both expatriate communities with the values observed among the general population in the United States and Canada (according to the World Values Survey). In the United States, 58% of the general population "considers oneself a religious person," whereas only 39.7% and 32.3% of all expatriates in Puerto Vallarta/BB and Ajijic/Chapala, respectively, do so—18 and 25 percentage points lower. In Canada,

the corresponding figure for the general population is 36.1%, which in practice aligns closely with the shares reported by expatriates in these Jalisco localities.

By contrast, the combined proportion of "non-religious" plus "convinced atheists" is 41.2% in the United States and 63.9% in Canada. The U.S. figure is lower than that reported by U.S. expatriates in Puerto Vallarta/BB (53.8%) and, even more so, in Ajijic/Chapala (61.9%). This is not the case for Canada: at 63.9%, the national proportion exceeds the combined share of non-religious and atheists among Canadian expatriates in both Puerto Vallarta/BB and Ajijic/Chapala.

Table 48. On a scale from 1 = "Not at all important" to 10 = "Very important," how important would you say God is in your life?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Arithmetic mean	5.49	4.83

Table 49. On a scale from 1 = "Not at all important" to 10 = "Very important," how important would you say God is in your life? By locality and nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
Arithmetic mean	6.12	5.25	4.95	3.88

Given the predominance of monotheistic religions, it is pertinent to inquire about attitudes toward "God" in general. To this end, we posed the question, "How important is God in your life?" using a scale from 1 ("Not at all important") to 10 ("Very important"). The arithmetic mean indicates toward which end of the scale the interviewed expatriates tend (Tables 48 and 49). The mean for Puerto Vallarta/BB is 5.49, and the corresponding figure for Ajijic/Chapala is 4.83. These numerical values may be interpreted as reflecting a low average importance of "God" in the lives of expatriates; put differently, while "God" is present in their personal lives, the salience is clearly distant from the upper end of the scale—an outcome consistent with the preceding variables. It is also useful to compare the values of the "importance of God" variable by nationa-

lity within the two Jalisco localities. The arithmetic mean for U.S. nationals in Puerto Vallarta is 6.12 points, higher than the mean in Ajijic/Chapala (5.25). For Canadians, the arithmetic mean is 4.96 in Puerto Vallarta/BB and 3.88 in Ajijic/Chapala.

Comparing the "importance of God" values in the two Jalisco localities with those recorded among the general populations of the United States and Canada, we observe that the U.S. mean is 7.05 points—higher than those of expatriates in both Puerto Vallarta/BB and Ajijic/Chapala. By contrast, Canada's population mean is 4.96 points, lower than that of expatriates in Puerto Vallarta/BB and nearly identical to that of expatriates in Ajijic/Chapala.

In sum: low membership in religious denominations, limited fulfillment of ecclesial obligations, a weak sense of religiosity, and modest average salience of the divine in expatriates' lives together indicate the predominance of a culture only lightly permeated by religious values and beliefs—one that is, rather, markedly pluralistic and grounded in secular values, accompanied by a more open mindset on salient public and private matters. In any case, it should be added that the values for these variables are consistently somewhat lower in Ajijic/Chapala than in Puerto Vallarta/BB, and that Canadians are generally less religious than U.S. nationals. Put differently, the aforementioned pluralism appears to be slightly greater in Ajijic/Chapala and among expatriates from Canada. Likewise, this pluralism is clearly greater among U.S. expatriates in both communities than among the U.S. population at large. Among Canadians, by contrast, there appears to be greater parity between expatriates in both communities and residents in Canada.

This does not imply the absence of a segment that scores high on these dimensions of religiosity in the two localities studied; however, as noted, this segment likely comprises around one-third of respondents. This observation matters because religiosity, while it may clash with certain secular values, also converges with other civic values—for instance, when considering philanthropic activities.

Public Morality

The features of religiosity observed among expatriates in Puerto Vallarta/BB and Ajijic/Chapala already suggest the opening of spaces conducive to the develop-

ment of a secular, reflective moral judgment, alongside a more open moral outlook inclined toward diversity, tolerance, and personal freedom in the selection of values, courses of personal action, and ways of life.

To corroborate these conjectures, we analyze below the results of several questions on contentious topics included in the survey conducted among expatriates in Puerto Vallarta/BB and Ajijic/Chapala between 2019 and 2020.

The first of these concerns the *voluntary termination of pregnancy,* a subject that generates profound divisions and disagreements within society—sometimes even leading to confrontation between public authorities and government, on the one hand, and broad social groups and movements, on the other, or between these and ecclesiastical authorities supported by large religious constituencies, in many parts of the world.

In this regard, the stance of expatriates in the two localities under study is striking and leaves little room for doubt. Respondents were asked to place their opinion on the *semantic differential* presented in Table 50, with a scale ranging from 1, indicating the most favorable position toward *freedom to decide* on abortion ("pro-choice"), to 10, indicating the position most favorable to prohibiting abortion ("pro-life").

If we first consider the arithmetic mean, the prevailing positions clearly tilt toward freedom to decide on abortion. The corresponding means are 3.09 for Puerto Vallarta/BB and 2.12 for Ajijic/Chapala—that is, values very close to 1, the strongest position in favor of women's freedom to decide over their own bodies. To elaborate and better capture these positions—along with the differences between the two communities—we observe that support for "freedom to decide" among expatriates in Puerto Vallarta/BB (sum of responses falling between 1 and 5 on the scale) amounts to 68.4%, with 51.4% selecting position 1 (the strongest support for freedom to decide). In Ajijic/Chapala, support for "freedom to decide" is even more decisive, as already suggested by the mean (2.12). Specifically, 72.2% of responses fall at the most extreme pro-choice position (1), and a total of 84.3% fall between 1 and 5.

Table 50. Speaking of controversial issues, on the specific question of abortion, toward which side of the scale does your personal opinion lean?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
1 Freedom of choice	51.4	72.2
2	4.2	4.3
3	2.9	3.0
4	2.9	2.5
5	7.0	2.3
6	3.4	2.0
7	1.0	0.5
8	2.9	0.5
9	2.9	1.5
10 Pro-life	11.7	6.8
DK/NA	9.7	4.5
Mean	3.09	2.12
Cases	383	399

Table 51

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
1 Freedom of choice	52.4	49.1	71.9	76.4
2	6.1	2.8	3.5	5.5
3	2.0	3.2	3.6	1.8
4	2.7	3.2	2.9	0.0
5	4.1	9.3	1.8	1.8
6	0.7	5.6	1.5	5.5
7	1.4	0.9	0.8	0.0
8	2.7	2.8	0.6	-
9	6.1	0.9	2.3	0.0
10 Pro-life	14.3	10.2	7.1	3.6

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
DK/NA	7.5	12.0	3.8	5.5
Mean	3.35	2.96	2.21	1.82
Cases	383		399	

Support for, or opposition to, abortion is distributed in a broadly similar manner across both communities when respondents' nationality is taken into account (Table 51). The proportion of Americans and Canadians in Ajijic/Chapala who place themselves at point "1" on the scale—the position representing the strongest support for a woman's right to choose an abortion—is considerably higher, at 71.9% and 76.4%, respectively, than among Americans and Canadians in Puerto Vallarta/BB. Although support in the latter location is also substantial, the corresponding proportions are significantly lower, at 52.4% and 49.1%, respectively, at point "1" on the scale (pro-choice). Thus, while slightly more than two-thirds of expatriates of both nationalities in Ajijic/Chapala express the highest level of support for abortion rights, only about half of their counterparts in Puerto Vallarta/BB do so.

At the other end of the scale, the strongest opposition to abortion—point "10," corresponding to the pro-life position—is expressed by 14.3% of Americans and 12% of Canadians in Puerto Vallarta/BB. The corresponding figures are minimal in Ajijic/Chapala, where only 3.8% of Americans and 5.5% of Canadians express the highest level of opposition to abortion.

A similar pattern can be observed in attitudes toward marriage between people of the same sex—that is, toward individuals' freedom to make decisions regarding their sexual orientation and gender identity, as well as their right to choose the partner with whom they wish to share their lives in a marital relationship. In Puerto Vallarta/BB, 59.3% of expatriates express support for same-sex marriage, compared with 67.7% in Ajijic/Chapala (Table 52). It should be noted that opposition does not represent a significant challenge in either location, accounting for only 4.7% and 4.5%, respectively. It is therefore noteworthy that "Indifferent"

constitutes the second-largest response category, at 30.3% in Puerto Vallarta/BB and 26.3% in Ajijic/Chapala.

In this case, the difference between the two locations is smaller than that observed with respect to abortion. Explicit support for marriage equality is approximately 8 percentage points higher in Ajijic/Chapala than in Puerto Vallarta/BB. Likewise, support among expatriates of both nationalities residing in Ajijic/Chapala is more pronounced than among their compatriots living in Puerto Vallarta/BB (Tables 52 and 53).

Table 52. Are you for or against same-sex marriage, or are you indifferent?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
In favor	59.3	67.7
Against	4.7	4.5
Indifferent	30.3	26.3
DK/NA	5.5	1.5
Cases	382	399

Table 53. Are you for or against same-sex marriage?
By locality and nationality Según

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
In favor	64.6	54.2	70.0	60.7
Against	4.8	5.1	4.6	4.4
Indifferent	25.9	33.8	23.3	32.9
DK/NA	4.8	6.9	2.0	1.8
Cases	383		399	

Expanding on this from the standpoint of nationality (Table 46), in Puerto Vallarta/BB 64.6% of U.S. respondents declare themselves “In favor” of same-sex marriage, and 54.2% of Canadians do likewise (only 4.8% and 5.1%, respectively, are “Against”). In Ajijic/Chapala, 70% of U.S. respondents are “In favor” on this issue and 60.7% of Canadians as well (with minimal opposition of 4.6% and 4.4%, respectively). It is therefore beyond doubt that, with respect to sexual

diversity, both communities support and respect it, displaying visibly tolerant attitudes—considerably stronger in Ajijic/Chapala.

Another particularly controversial issue concerns the legal status of currently prohibited drugs and the debates surrounding their potential decriminalization. Table 54 lists three alternatives in this regard. A majority—57%—favors the option "Only marijuana should be decriminalized" in both Puerto Vallarta/BB and Ajijic/Chapala. Recall that marijuana is decriminalized for recreational use in 24 U.S. states and nationwide in Canada. For the second, more far-reaching option—"All illegal drugs should be decriminalized"—the responses diverge: in Puerto Vallarta/BB, 17.5% agree with this statement, while in Ajijic/Chapala agreement rises to 29.6%. Thus, the principal difference between the two communities on this point lies in the more permissive stance that expatriates in Ajijic/Chapala adopt toward all "hard" drugs. If we add these percentages to those favoring the decriminalization of marijuana, support for decriminalizing all drugs amounts to 86.5% in Ajijic/Chapala and 74.9% in Puerto Vallarta/BB. The support is therefore robust in both places, though stronger in Ajijic/Chapala by 11 percentage points.

Table 54. If drug decriminalization were proposed, what would you think? Puerto Vallarta/Bahía de Banderas, Ajijic/Lake Chapala

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Only marijuana should be decriminalized	57.4	56.9
All currently illegal drugs should be decriminalized	17.5	29.6
No currently illegal drug should be decriminalized	11.2	6.5
DK/NA	13.3	7.0
Cases	381	399

Table 55. Drug decriminalization by locality and nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
Only marijuana should be decriminalized	61.2	56.9	57.0	61.7
All currently illegal drugs should be decriminalized	19.0	15.7	28.5	24.8
No currently illegal drug should be decriminalized	8.8	12.0	7.1	6.3
DK/NA	10.9	15.3	7.3	7.2
Cases	383		399	

Advocacy for the decriminalization of "all drugs," including marijuana, is expressed by 80.2% of U.S. nationals in Puerto Vallarta/BB, compared to 72.6% of Canadians (Table 48). In Ajijic/Chapala, 85.5% of U.S. nationals and 86.5% of Canadians take the same position. The largest difference, as can be seen, appears among Canadians across the two communities: a 14-percentage-point higher share in Ajijic/Chapala than in Puerto Vallarta/BB.

In summary, among expatriates residing in the communities studied, those who do **Not** profess any particular religious creed predominate—a pattern consistent with their emphatic support for *women's freedom to decide on abortion (pro-choice)*, their equally decisive *approval* of *same-sex marriage*, and, finally, the overwhelming majority consensus in favor of *decriminalizing marijuana* and, to a significant degree, *all currently illegal drugs*. Underpinning each of these issues is a liberal ethical ideal grounded in the primacy of personal liberty and, as we shall see, in pronounced left-of-center political leanings and an overwhelmingly strong preference for democratic government.

CHAPTER 6.
Political Identity

Up to this point, we have outlined some features of the cultural identity of expatriates in Puerto Vallarta and Bahía de Banderas, as well as in Ajijic and Chapala. We saw that they share some of these traits, but also that there are differences in the cultural profile of each community, which add to others already revealed earlier, such as type of residence, average age, marital status, lifestyles, level of education, degree of religiosity, or attitudes associated with an open-minded outlook on sensitive issues on the public agenda.

Much the same can be said of political identity: there are similar attitudes, but the differences deepen somewhat on relevant political issues, though without reaching any significant disagreements. In fact, we believe that the differing degree of cohesion that exists in both communities is reinforced by the effects of the particular political identity present in each of them, as well as by consensus around certain values of a political nature. In particular, among Americans there prevails a circumstance opposite to what is observed in their country: polarization and divisiveness are completely foreign to the communities they belong to in Puerto Vallarta—and even more so in Ajijic.

Interest in Politics and Democratic Identity

To begin, we refer to the information contained in Table 56 in relation to the question, "How interested are you in politics?" As shown, 32.6% of expatriates in Puerto Vallarta/Bahía de Banderas say they are "very interested," compared to 39.8% of residents in Ajijic/Chapala. This is a 7 percentage-point difference,

but both figures fall within the same range of broad interest in political matters across the two communities. The response "interested" accounts for 44.6% in Puerto Vallarta/Bahía de Banderas and 40.9% in Ajijic/Chapala. If we add both responses, we observe a clear interest in politics in 77.2% of cases in the first locality and 80.7% in the second. It is therefore clear that these are highly politicized communities that likely follow closely the course of political processes in their respective countries and are willing to get involved in collective decisions that affect them locally. It can be inferred that these are highly participatory communities, with the intensity necessary to contribute to their own goals, but also to the goals of the host communities.

Table 56. How interested are you in politics?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Very interested	32.6	39.8
Interested	44.6	40.9
Slightly interested	16.2	13.8
Not interested	5.5	4.8
Cases	379	399

In this case, Canadian and U.S. expatriates also exceed the participation levels observed among the populations in their respective home countries. Politics elicits "a great deal of interest" among 19.4% of citizens residing in Canada and 21.1% of citizens in the United States. The combined share of "a great deal of interest" and "interest" is 62.5% in Canada and 64.1% in the United States. On this measure, both countries align with one another and fall well below the levels of political interest reported by expatriates in the two Jalisco communities examined here.

Among *Canadian* expatriates, those reporting "a great deal of interest" in politics total 25.0% in Puerto Vallarta/BB and 28.6% in Ajijic/Chapala—that is, 5 and 9 percentage points higher, respectively, than among their compatriots in Canada. When "a great deal of interest" and "interest" are combined, Canadian expatriates reach 79.2% in Puerto Vallarta/BB and 76.8% in Ajijic/Chapala.

These combined figures among expatriates exceed the national Canadian percentages by 16 and 14 percentage points, respectively.

For their part, *U.S. expatriates* who are "very interested" in politics constitute 44.2% in Puerto Vallarta/BB and 44.7% in Ajijic/Chapala. This reflects a markedly higher level of interest than among citizens in the United States, surpassing the latter by 23 percentage points in both localities. Relative to the combined share of "a great deal of interest" plus "interest" in the United States (64.1%), U.S. expatriates in Puerto Vallarta/BB (78.2%) and Ajijic/Chapala (83.0%) are, respectively, 14 and 19 percentage points above the national figures.

Finally, the category "a great deal of interest" in politics receives a substantially higher proportion of mentions among U.S. expatriates than among Canadian expatriates: 44.2% versus 25.0% in Puerto Vallarta/BB, and 44.7% versus 28.6% in Ajijic/Chapala. In short, the intensity of political interest is markedly greater among the former.

Table 57. Level of Interest in Politics, by Locality and Nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
Very interested	44.2	25.0	44.7	28.6
Interested	34.0	54.2	38.3	48.2
Slightly interested	15.0	16.7	12.4	15.1
Not interested	6.1	3.2	3.6	6.2
DK/NA	0.7	0.9	0.8	1.8
Cases	383		399	

At this point, it is also relevant to ask whether that interest is framed by and refers to the values of democratic politics. Tables 58 and 59 provide the information needed to infer as much. They indicate a strong democratic identity in both expatriate communities. When asked to choose between "democracy" as a form of government and an "authoritarian government," 81% in Puerto Vallarta prefer "democracy," and an even higher share—93.7%—do so in Ajijic/Chapala. Preference for an "authoritarian government" is practically nonexistent in both expatriate communities (hovering around 1%).

Table 58. What do you think: Is democracy preferable to any other form of government, or can an authoritarian government be preferable?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
Democracy is preferable	81.2	93.7
An authoritarian government can be preferable	1.3	0.8
Not interested	7.6	1.8
DK/NA, Missing	9.9	3.8
Cases	383	399

The preceding information anticipates a more favorable attitude toward democracy in Ajijic/Chapala among both Canadians and Americans, which is confirmed in Table 59. Indeed, U.S. expatriates report "preference for democracy" rates of 79.6% in Puerto Vallarta/BB and 93.5% in Ajijic/Chapala—that is, 14 percentage points higher in the latter locality. The figures for Canadians are similar: 83.3% in Puerto Vallarta/BB and 91.8% in Ajijic/Chapala (an 8-point increase). These are exceptional levels, given the relatively diminished credibility of democratic regimes in many parts of the world today and the concomitant rise in preferences for authoritarian leadership.

Table 59. What do you think: Is democracy preferable to any other form of government, or can an authoritarian government be preferable? By Locality and Nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala	
	EU	Canadá	EU	Canadá
Democracy is preferable	79.6	83.3	93.5	91.8
An authoritarian government can be preferable	2.0	0.9	1.0	0.0
Not interested	7.5	7.4	1.8	3.7
DK/NA	10.9	8.3	3.5	4.5
Cases	383			

Predominance of a Left-Wing Identity

Another central element of expatriates' political identity is the specific ideological orientation that distinguishes them. To examine this, we include here two dimensions: the *"Left"/"Right"* axis and the "*Liberal"/"Conservative*" axis. The results are particularly noteworthy, as they reveal marked political and ideological differences between the two foreign communities—differences that align in several respects with those already noted regarding lifestyle or religiosity, as well as positions on contentious issues such as abortion, same-sex marriage, or drug decriminalization.

The first indicator is the arithmetic *mean* derived from the semantic differential scale in Table 60, which ranges from 1 *("Left")* to 10 *("Right").* On a first reading, in Puerto Vallarta/BB the mean of 5.03 suggests a slight inclination toward the *center-left*, whereas in Ajijic/Chapala, with a mean of 3.36, the tendency is clearer and more emphatic toward the far left. Put differently, in one community (Ajijic) a particularly strong left-wing identity predominates—with a dominant preponderance of the *far left*, as we shall see—while in the other (Puerto Vallarta) there is a more measured inclination toward the center-left, though still a definitional one.

Disaggregating the analysis allows us to see more clearly the true magnitudes of the predominant ideological orientation in each of the two expatriate communities, as well as the extent of their differences. Considering now the percentages in Table 60, the share identifying with the "Left" in general (responses 1 through 5 on the scale) in Puerto Vallarta rises to 53% (just over half), compared with 35.8% who self-identify with the "Right" in general (responses 6 through 10 on the same scale, i.e., a little over one-third). This is, evidently, a clear majority for a left-wing identity, exceeding the right by 17 percentage points. In Ajijic/Chapala, however, the magnitudes of the distance between "left" and "right" are magnified. In this case, the sum of responses in favor of the "left" reaches 77.6% of respondents, compared with only 17.3% positioned on the "right" (less than one-fifth). The gap in favor of the left is more than striking, amounting to 66 percentage points.

Table 60. In politics, people speak of Left and Right. In general terms, where* would you place your point of view on the following scale?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
1 Left	12.0	21.3
2	6.0	16.0
3	11.0	18.5
4	6.8	10.5
5	17.2	11.3
6	11.7	5.0
7	5.0	5.5
8	7.6	4.0
9	4.2	0.3
10 Right	7.3	2.5
Mean	5.03	3.36
Cases	340	399

Disaggregating the matter further, we divide the left position into "far left" (points 1, 2, and 3 on the scale), "left" (point 4), and "center-left" (point 5). In turn, the right is subdivided into "far right" (points 8, 9, and 10), "right" (point 7), and "center-right" (point 6).

In Puerto Vallarta/BB, 29% of expatriates place themselves on the "far left," 6.8% on the "left," and 17.2% on the "center-left." It is evident that in this locality there is something of a balance between somewhat *moderate left* positions and *far-left* positions. In Ajijic/Chapala the proportions are markedly different: 55.8% of expatriates lean toward the "*far left*" (nearly double the share in Puerto Vallarta/BB), 10.5% toward the "left," and 11.3% toward the "center-left." In other words, the more radical positions—at or very close to the "far left"—predominate here.

On the other hand, in Puerto Vallarta/BB, 11.5% of expatriates identify with the "far right," 12.6% with "right," and 11.7% with "center-right." The distance between the "far right" and the "far left" is only 6 percentage points in favor of the latter. This is not the case among expatriates residing in Ajijic/Chapala. There, only 2.8% self-identify with the "far right," 9.5% place themselves on the "ri-

ght," and 5.0% on the "center-right." Thus, the gap between the extremes of the scale reaches very high levels in this case: the *"far left"* exceeds the *"far right"* by 34 percentage points. The arithmetic means in Ajijic/Chapala, 3.36, is therefore explained by the fact that the three positions most closely aligned with the "far left" (levels 1, 2, and 3 on the scale) alone account for 55.8% of responses.

The statistical measures analyzed thus far regarding left-right identity encompass expatriates of several nationalities, with particular emphasis on those from the United States and Canada. It is therefore worthwhile to further disaggregate the analysis on this variable and examine differences between Americans and Canadians within each foreign community. Likewise, we can compare the identity expressed by expatriates in Puerto Vallarta/BB and Ajijic/Chapala with that expressed by their compatriots in their respective home countries.

We begin with the second issue. If we compare the arithmetic means obtained on the "Left"/"Right" scale in the *World Values Survey*—conducted in the United States in 2017 and in Canada in 2020—we find significant differences in the political orientation reported by their respective citizens relative to the survey conducted among expatriate communities in the two Jalisco localities at the end of 2019 and beginning of 2020 (Table 54).

The national mean observed in the United States on the aforementioned scale is 5.32 (Table 61), whereas the mean among U.S. expatriates is 4.59 in Puerto Vallarta/BB and 3.28 in Ajijic/Chapala. In percentage terms, U.S. citizens who place themselves on the "left" total 58.1%, while those who lean to the "right" total 39.1%. That is, the United States also exhibited a majority identity inclined toward the "left," at least in 2017—though not to the same extent as the predominance observed in Puerto Vallarta/BB and Ajijic/Chapala.

Table 61. In politics, people speak of Left and Right. In general terms, where do you place your point of view on the following scale?

	Canadá	Estados Unidos
Left	4.2%	8.6%
2	4.8%	4.8%
3	11.0%	10.9%

	Canadá	Estados Unidos
4	8.5%	7.6%
5	33.0%	26.2%
6	13.9%	9.5%
7	10.5%	8.6%
8	7.9%	8.9%
9	2.9%	4.7%
Right	3.2%	7.4%
Mean	5.24	5.32
Cases	(4,018)	(2,524)

Source: WVS, 2018.

Table 62. In politics, people speak of Left and Right. In general terms, where do you place your point of view on the following scale?
By Locality and Nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Chapala	
	EU	Canadá	EU	Canadá
1 Left	19.7	9.2	25.0	7.3
2	10.2	4.3	20.0	12.7
3	15.3	10.3	20.8	16.4
4	5.1	9.7	8.3	14.5
5	15.3	23.2	6.7	12.7
6	10.2	15.7	3.3	12.7
7	2.2	7.6	6.7	7.3
8	7.3	7.6	4.2	3.6
9	5.1	4.9	-	-
10 Right	9.5	7.6	3.3	1.8
Mean	4.59	5.31	3.28	3.78
Cases	340		182	

American expatriates in the two locations examined in this study therefore have a political identity that leans even further to the left than that of their counterparts living in the United States. In turn, Americans residing in Ajijic/Chapala, with a mean score of 3.28, lean more strongly to the left than their counterparts both in Puerto Vallarta/BB, whose mean score is 4.59, and, to an even greater extent, in the United States, where the mean is 5.32. These differences become clearer when the same data are expressed as percentages. In the United States, the combined proportion of respondents selecting positions 1, 2, and 3 on the scale—which, for the purposes of this discussion, are treated as indicating a "far-left" orientation—is 24.3%. The corresponding proportion is 45.2% in Puerto Vallarta/BB and as high as 65.8% in Ajijic/Chapala. In general terms, Americans living both in the United States and in Puerto Vallarta/BB place themselves near the "center-left," whereas those residing in Ajijic/Chapala position themselves decidedly toward the "far left." The proportion of Americans in the "far-left" category in Ajijic/Chapala exceeds that of their counterparts living in the United States by 41 percentage points and that of their counterparts in Puerto Vallarta/BB by 20 percentage points (Table 62).

Having said this, the terms "far left" and "radical left," as used here in reference to expatriates from the United States, require some clarification. In general, they refer to firmly held liberal and progressive positions on political issues of particular relevance in the United States. They have little in common with the meanings these terms have traditionally carried in certain European or Latin American countries, where the far left was generally anti-liberal, anti-individualist, anti-capitalist, and opposed to representative liberal democracy, drawing primarily on the Marxist tradition and on radical forms of socialism, communism, or anarchism.

If anything, the radical left in the United States advocates ideological and policy positions more closely aligned with European social democracy and, in particular, with the British Labour Party. Typically, someone identified with the far left supports a woman's freedom to make decisions concerning her own body; publicly funded social welfare and healthcare programs, such as "Medicare for All" and "Obamacare"; reductions in military spending—welfare rather than warfare; more assertive environmental policies; stricter gun-control measures

in relation to the Second Amendment; more humane policies concerning immigration and interracial relations; and progressive taxation. Examples include positions associated with Democratic politicians such as Bernie Sanders and members of the progressive congressional group known as "the Squad," including Representative Alexandria Ocasio-Cortez, as well as Tim Walz, Governor of Minnesota; Senator Elizabeth Warren; Kamala Harris; and Zohran Mamdani, to mention only a few political figures.

It is therefore not surprising that, according to Larry Phil, a Democrats Abroad representative in Ajijic, Bernie Sanders won the Democratic Party primary held in the community in 2016 with 69% of the vote, compared with only 31% for Hillary Clinton (Paullier, 2016).

For its part, the national mean recorded in Canada in 2020 by the WVS, using the same scale, was 5.24. Canadian expatriates had a mean score of 5.31 in Puerto Vallarta/BB and 3.78 in Ajijic/Chapala (Table 62). In other words, the arithmetic means observed in Canada and Puerto Vallarta tend toward the center-left, whereas Canadians in Ajijic/Chapala, like their American counterparts, lean clearly toward the far left. When the same scale is expressed in percentage terms, 61.5% of Canadians living in Canada place themselves broadly on the "left," corresponding to points 1 through 5 on the scale, while 38.4% place themselves broadly on the "right," corresponding to points 6 through 10. Canadians living in Canada therefore appear to be slightly more left-leaning, at 61.5%, than Americans living in the United States, at 58.1%.

The analysis may be developed further by examining the data in greater detail. First, in general terms, 56.7% of Canadians in Puerto Vallarta/BB lean toward the "left," while 43.4% lean toward the "right." In Ajijic/Chapala, the distribution is as follows: 63.6% identify broadly with the "left," while 25.4% identify with the "right." Thus, although a majority of Canadians in Puerto Vallarta/BB lean to the left, at 56.7%, they do so with somewhat less intensity and in a smaller proportion than their counterparts residing in Canada, at 61.5%. Canadians living in Ajijic/Chapala, at 63.6%, are slightly more left-leaning than citizens residing in Canada, at 61.5%, and clearly more so than their counterparts in Puerto Vallarta/BB, at 56.7%. In any event, the differences among Canadians residing in Canada and Canadian expatriates living in Puerto Vallarta/BB

and Ajijic/Chapala are less pronounced than those observed among Americans across the three locations.

Once again, to facilitate comparison and given the predominance of a left-wing identity, we may now consider Canadians who place themselves at points 1, 2, and 3 on the scale—that is, those who lean decidedly toward the "far left." In Canada, 20% place themselves in this category. In Puerto Vallarta/BB, the proportion is somewhat higher, at 23.8%, while in Ajijic/Chapala it is higher still, at 36.4%. Once again, like Americans in Ajijic/Chapala, Canadians residing there display a more "radical" left-wing orientation than their counterparts in Canada and Puerto Vallarta/BB.

At this point, it is useful to expand the analysis by comparing Americans and Canadians across the three locations examined here. As noted above, 58.1% of people in the United States identify broadly with the "left," compared with 61.5% in Canada. In the United States, 24.3% place themselves toward the "far left"—the combined total for points 1, 2, and 3 on the scale—compared with 20.0% of Canadians in Canada. In Puerto Vallarta/BB, 45.2% of Americans lean toward the "far left," compared with 23.8% of Canadians. In Ajijic/Chapala, 65.8% of Americans fall within the "far-left" category, compared with 36.4% of Canadians.

Thus, although the proportion of people who identify broadly with the "left" is slightly higher in Canada than in the United States, the same pattern is not observed among Canadians in Puerto Vallarta/BB and Ajijic/Chapala. In these locations, Americans are clearly more numerous than Canadians among those who lean toward the "far left." To reiterate, in both communities, left-wing political identity is more "radical" among expatriates from the United States than among those from Canada.

Finally, as in the United States, the Canadian left is associated with the European social-democratic tradition and the British Labour tradition, although it may be divided into two positions represented within Canada's party system: that of the Liberals and that of the New Democrats. Nevertheless, as in the United States, both generally tend toward a center-left position. Canadian Liberals adhere to the principles of social liberalism and support, among other policies, universal healthcare, a public pension system, multiculturalism, gun control, en-

vironmental policies aimed at addressing global warming, same-sex marriage, the legalization of marijuana, and women's right to make decisions concerning their own bodies (Wikipedia, n.d.).

Predominance of a Liberal Identity

To complete the profile of the political identity of expatriates in Puerto Vallarta/BB and Ajijic/Chapala, we asked respondents how they position "their general way of thinking" along the "Liberal"– "Conservative" dimension, in addition to their "identification" with any political party. In this way, we further specify and make explicit the particular filter that shapes the political identity of Americans and Canadians living in both communities—already noted in the analysis of the "Left"–"Right" dimension.

The results for expatriates' placement on the "Liberal"/ "Conservative" dimension are shown in Tables 63 and 64. In general, both communities predominantly locate their way of thinking within the "Liberal" camp. This is the case for 41.5% of expatriates in Puerto Vallarta/BB (a relative majority) and an even larger share in Ajijic/Chapala, reaching 59.4% (an absolute majority). The latter community surpasses the former in identification with liberalism by 18 percentage points. Conversely, "Conservative" identity ranks second, but in a higher proportion in Puerto Vallarta/BB (27.4%), a figure that doubles the corresponding share in Ajijic/Chapala (14.8%). In any event, "conservatism," like the "right," remains far behind "liberal" and "left" positions in Puerto Vallarta/BB, and even more distant in Ajijic/Chapala. To elaborate: "libertarians" constitute the third-largest group in Puerto Vallarta/BB (6.3%), whereas in Ajijic/Chapala that position is occupied by "socialists" (8.8%)—compared with 5.5% "socialists" in Puerto Vallarta.

Table 56 can be read in a complementary way as follows. We may add "conservatives" to "libertarians" (who converge on many items of the governmental agenda). The sum of these two identifications yields 33.7% of cases in Puerto Vallarta/BB and 22.1% in Ajijic/Chapala. By contrast, the sum of liberals and socialists amounts to 47% in Puerto Vallarta/BB and 68.2% in Ajijic/Chapala.

Table 63. Considering your general way of thinking, would you say you are:

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala*	
	Si	No	Sí	No
Conservative	27.4	64.8	14.8	85.2
Libertarian	6.3	85.9	7.3	92.7
Liberal	41.5	50.7	59.4	40.6
Socialist	5.5	86.7	8.8	91.2
Other	10.2	82.0	8.5	87.5

* Other" includes: Social Democrat, Pragmatist, Universal Socialist, Evolutionist.

Briefly put, the "Liberal" identity—and, of course, the "Socialist" identity as well—aligns with the principal beliefs and "way of thinking" we have already outlined in reference to a left-wing identity. It was also confirmed that the meaning of both identity categories is similar for Canadians and Americans. What remains to be seen is whether inclinations toward one or the other component (Liberal/Conservative) of this dimension are distributed similarly—or not—between the two nationalities.

In Puerto Vallarta/BB, *Canadians* are more evenly split between liberals (36.1%) and conservatives (31.5%), with liberals holding a slim lead of 4.6 percentage points. Although clearly a minority, "libertarians" remain the third option (7.9%) among Canadians in Puerto Vallarta/BB, followed closely by socialists (6.5%). In Ajijic/Chapala, the picture is different: here, Canadian liberals constitute a clear majority, with 51% self-identifying with this option. Conservatives, while still present at 24.9% (nearly one-quarter), trail liberals by 26 percentage points. Meanwhile, in this community, socialists (8.9%) now outnumber libertarians (4.4%) by a factor of two.

Table 64. Speaking in general terms, would you consider yourself…?
By locality and nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala	
	EU	Canadá	EU	Canadá
Conservative	23.1	31.5	11.7	24.9
Libertarian	3.4	7.9	8.4	4.4
Liberal	51.7	36.1	62.9	51.0
Socialist	2.7	6.5	7.6	8.9
Other	8.2	11.6	8.5	8.9
Other (Social Democrat)	-	-	0.8	1.8
	383		399	

U.S.-born expatriates are more clearly defined in their "general" way of thinking. In Puerto Vallarta/BB, 51.7% identify as liberal, whereas conservatives account for 23.1%—that is, a share 28 percentage points lower than liberals. In Ajijic/Chapala, the gap between liberals and conservatives is even wider: liberals comprise 62.9% of respondents, versus just 11.7% conservatives (a difference of 51 percentage points in favor of liberals). In both localities, libertarians constitute the third-largest group, with a minimal share in Puerto Vallarta/BB (3.4%) and a somewhat higher share in Ajijic/Chapala: 10.1% (a figure close to that of conservatives).

To reiterate in broad strokes: the predominance of liberals—coupled with the low presence of conservatives in Puerto Vallarta/BB and the even more reduced presence of the latter in Ajijic/Chapala, among both Canadians and Americans in these expatriate communities—complements the concurrent predominance of a left identity in both communities and, more generally, their majority progressive orientation in politics as well as in the realm of public morality (i.e., on controversial issues).

Identification with a Political Party

The fourth element of political identity to consider concerns expatriates' identification with a political party in Puerto Vallarta/BB and Ajijic/Chapala. In this

regard, the first thing to note is the overall level of party identification among expatriates, regardless of which party they prefer—that is, the degree of partisanship manifested. The relevant information is presented in Table 65. It is evident that party identification is more prevalent in Ajijic/Chapala, where 52.9% of respondents report such identification, compared with only 36.8% in Puerto Vallarta/BB—a difference of 16 percentage points in favor of Ajijic/Chapala. Put differently, while just over half of expatriates in Ajijic/Chapala already possess a defined partisan identity, this is true of only a little more than one-third of expatriates in Puerto Vallarta/BB.

Table 65. Speaking of political parties: Do you identify with any party?

	Puerto Vallarta / Bahía de Banderas	Ajijic / Ribera de Chapala
No	55.6	44.9
Yes	36.8	52.9
DK/NA, Missing	7.6	2.3
Cases	383	399

The next step is to examine and analyze political party identification according to the respondents' predominant nationalities, namely Canadians and Americans (Table 66). Among Canadians, those who identify with a political party account for 25.9% in Puerto Vallarta/BB and 27.3% in Ajijic/Chapala. These figures are nearly identical, which facilitates comparison with Canadians living in Canada as a whole. In this case, the proportion of party identifiers is higher in Canada, at 41%, than among Canadian expatriates in the two locations in Jalisco.

The opposite pattern is observed among Americans. The proportion of party identifiers in Puerto Vallarta/BB, at 53.7%, is slightly lower than the 56% reported for the population of the United States, according to the Pew Research Center. Both figures, however, are clearly surpassed by the proportion recorded in Ajijic/Chapala, where 65.1% identify with a political party.

Table 66. Do you identify with any political party? By locality and nationality

	Puerto Vallarta / Bahía de Banderas		Ajijic / Ribera de Chapala	
	EU	Canadá	EU	Canadá
No	42.2	64.8	31.5	71.7
Yes	53.7	25.9	65.1	27.3
Cases	383		346	

Comparing each community by nationality once again, we find larger figures in Ajijic/Chapala: there are more U.S. partisans at 65.1% (versus 53.7% in Puerto Vallarta/BB), and slightly more Canadian partisans at 27.3% (versus 25.9% in Puerto Vallarta/BB). It is also evident that, in both communities, Americans are far more partisan than Canadians: 53.7% versus 25.9% in Puerto Vallarta/BB (a gap of 28 percentage points), and 65.1% versus 27.3% in Ajijic/Chapala (a gap of 38 percentage points).

In sum, the expatriate community in Ajijic/Chapala is more politicized and partisan than its counterpart in Puerto Vallarta/BB; Canadian expatriates are less politicized and partisan than their compatriots in Canada and also less so than their U.S. neighbors in both Puerto Vallarta/BB and Ajijic/Chapala. Conversely, Americans are more politicized and partisan than citizens in the United States overall, and more so than Canadians; finally, U.S. expatriates are more politicized and partisan in Ajijic/Chapala than in Puerto Vallarta/BB.

With which party do expatriates identify?

Of particular relevance is the specific *political party* with which expatriates in Puerto Vallarta/BB and Ajijic/Chapala identify. We assume that affiliation with a particular party corresponds to expatriates' ideological orientation (progressive; left–right; liberal–conservative; see Pew Research Center, op. cit.).

To examine partisan identities in both communities, we consider, first, the percentage identifying with each political party as a share of all respondents in each locality, and second, the percentage identifying with each party calculated only among those who answered YES to identifying with a specific party.

Tables 67 and 68 report the cases that fall under the first definition. At first glance, identifiers with the Democratic Party are overwhelmingly predominant

among Americans in both communities, followed at a great distance by identifiers with the Republican Party. Of all Americans interviewed, 29.2% in Puerto Vallarta/BB align with the Democrats—clearly the leading group, though less predominant than in Ajijic/Chapala, where Democrats constitute 53.1% of U.S. expatriates, i.e., more than half of the total. Those aligned with the Republican Party account for only 4.1% of all interviewees in Puerto Vallarta/BB and just 5.5% in Ajijic/Chapala. The gap between Democrats and Republicans is thus 25 percentage points in Puerto Vallarta/BB—already very wide—but in Ajijic/Chapala it is enormous: Democrats outnumber Republicans by 48 percentage points. Moreover, Democratic identifiers among Americans in Puerto Vallarta/BB slightly exceed the combined share of Democratic and Republican identifiers in the United States (28%). U.S. expatriates in Ajijic/Chapala (53.1%), for their part, nearly double the domestic figure for Democratic and Republican identifiers combined.

Among Canadians the picture differs. Identifiers with the Liberal Party (the counterpart to the U.S. Democratic Party) predominate in Ajijic/Chapala at 13.7% of all respondents of this nationality, while Conservatives represent only 3.5%. In Puerto Vallarta/BB, by contrast, identifiers with the Conservative Party predominate, totaling 10.1% of all Canadians interviewed in that port city, whereas those aligned with the Liberal Party are a minority at 6.4%. Liberals are therefore the second option in Puerto Vallarta/BB and the first in Ajijic/Chapala, while Conservatives rank third in Ajijic/Chapala at 3.5%, narrowly surpassed by identifiers with the New Democratic Party, who garner 3.7% support.

Table 67. Which party do you identify with? Puerto Vallarta/BB

USA	Democratic Party	Republican Party	Independent		Other
% total	29.2	11.5	6.8	-	6.1
Canada	Liberal Party	New Democratic Party (NDP)	Green Party	Conservative Party	Other
% total	6.4	4.1	1.3	10.1	3.2

Table 68. Which party do you identify with? Ajijic/Chapala

USA	Democratic Party	Republican Party	Independent		Other
% total	53.1	5.5	1.6	-	3.2
Canada	Liberal Party	New Democratic Party (NDP	Green Party	Conservative Party	
% total	13.7	3.7	-	3.5	4.1

With respect to the second point, it is useful first to recall the disaggregated percentages for the segment that identifies with a political party. In Puerto Vallarta/BB, 53% of Americans and 25.9% of Canadians report a party affiliation. In Ajijic/Chapala, the corresponding proportions are 65.1% of Americans and 27.3% of Canadians.

Among Americans who report a partisan identity (Table 69), 56.0% of expatriates in Puerto Vallarta/BB identify with the Democratic Party, while in Ajijic/Chapala the proportion of Democrats rises to 83.2%. Conversely, 22.5% of Americans in Puerto Vallarta/BB identify with the Republican Party, a figure considerably higher than the proportion of self-identified Republicans in Ajijic/Chapala, where it reaches only 8.4%.

The predominance of Democrats among American expatriates is therefore substantial in Puerto Vallarta/BB, where they outnumber Republicans by 33 percentage points, and overwhelming in Ajijic/Chapala, where the difference reaches 75 percentage points. In Puerto Vallarta/BB, party identification reflects a moderate degree of political pluralism, together with some indications of a two-party pattern. In Ajijic/Chapala, however, one political party clearly predominates, and Democratic identification is overwhelmingly prevalent among expatriates from the United States.

The principal counterweight, in any case, is the segment that does not express a particular party affiliation, which accounts for 36% of all Americans residing in the Ajijic/Chapala area.

Table 69. Which party do you identify with? Puerto Vallarta / Bahía de Banderas and Ajijic/Chapala.
Percentages among the segment that DOES identify with a political party, by locality and nationality

USA	Democratic Party	Republican Party	Independent	
Puerto Vallarta	56.0	22.5	13.	
Ajijic/Chapala	83.2	8.4	4.8	
Canada	Liberal Party	New Democratic Party (NDP)	Green Party	Conservative Party
PuertoVallarta	25.4	16.3		40.0
Ajijic/Chapala	46.4	14.3	-	14.3

Canadian expatriates who DO identify with a political party display a different profile in these two communities. To begin with, in Puerto Vallarta/BB adherents of the Conservative Party outnumber those identifying with the Liberal Party—40.0% versus 25.4%, respectively. The New Democratic Party (NDP) garners 16.3%; combined with the Liberals (with whom it shares significant programmatic affinities), this yields 41.7%, a total that is nevertheless only 1.7 percentage points higher than the share aligned with the Conservative Party. In Ajijic/Chapala, however, party identification broadly mirrors the pattern observed among U.S. expatriates residing there. In this case, 46.4% of Canadians align with the Liberal Party, while identifiers with the Conservative Party decline to 14.3%—a figure equal to that of those aligned with the New Democratic Party. Naturally, there are ideological parallels between Canada's Liberal Party and the U.S. Democratic Party, and between the U.S. Republican Party and Canada's Conservative Party. Canada's New Democrats position themselves on the left of the political spectrum, like the Liberals, but show particular affinity with the U.S. radical left within the Democratic Party (of the Bernie Sanders or Alexandria Ocasio-Cortez variety).In any case, Canadians exhibit a somewhat more bi- or tripartisan profile, with predominance either conservative (in Puerto Vallarta/BB) or liberal (in Ajijic/Chapala). If we combine affiliations with the Liberal Party and the New Democratic Party (totaling 60.7%), an ideologically

left-leaning partisan consensus among Canadians in Ajijic/Chapala does seem to be corroborated—albeit not to the spectacular magnitudes observed among U.S. Democrats also residing in this community.

By way of Conclusions

The contrasting histories and formation processes of the two communities studied here were sketched in broad strokes in Part One of the book. To begin with, one community began to take shape at the end of the nineteenth century, while the other started to coalesce around 1950. The first gained international visibility—within the reach and conditions of its time—thanks to the writings of travelers and chroniclers, whereas the other projected itself through cinema, especially via a famous film. In the 1920s, the renowned British writer *D. H. Lawrence* left his mark on Chapala, while in Puerto Vallarta two enterprises were inscribing their names in the city's history (*Alfred W. Geist* of the Unión mining company in Cuale, and *Joseph W. Montgomery* of the mercantile firm bearing his name).

In the 1950s, both foreign communities drew the attention of the U.S. press—chiefly outlets such as *Life Magazine*, *Squire*, and *Look Magazine*, among others. In that decade and the next (the 1960s), both communities hosted figures associated first with the literary, musical, and artistic movement of the *Beatnik* scene—largely tied to California's cultural milieu—a segment of expatriates that *Life Magazine* labeled the "*Bohemian*" sector in Chapala and Ajijic. Later, both communities welcomed figures representative of the literary, artistic, and cultural movement associated with the *Hippie* scene that spread across the United States and Canada.

Although life in both places largely unfolded in a less provocative and eccentric atmosphere, they were nonetheless part of the spirit of the era and felt

the influence of these countercultural movements—and, more generally, of the period's forward-looking mindset—which permeated important aspects of *Baby Boomers* identity in both locales. Ajijic/Chapala, in particular, has served as a retirement destination for pensioners, many of whom have been writers, poets, musicians, sculptors, visual artists, and philanthropists. The same holds true for Puerto Vallarta, though there the most prominent figures during its heyday were tied to the film industry and, later, to the business world, especially in hospitality. The historical trajectories of both communities are reflected in the contours of the sociocultural and political identity that predominates in each destination, as evidenced by our analysis of the Attitudes and Values Survey administered in both.

Over time, both communities grew with the arrival of new foreigners—stemming mainly from Canada and the United States (in that order) in Puerto Vallarta/BB, and from the United States and Canada (in that order) in Ajijic/Chapala. We sought to put a human face on both communities by citing concrete names of notable personalities and residents. At the end of Part One, we also provided estimates of the numbers of permanent and seasonal residents in both places, to give a sense of the scale now attained by the foreign communities that are the subject of this study.

Finally, it is worth underscoring another outstanding feature in the formation of these two expatriate communities: the names that stand out for their leadership, influence, and contributions to the development of both communities are predominantly women's. Zara Alexeyeva ("La Ruza"), Neill James, and Ilona Kupik in Ajijic and Chapala, and Federika Holtz, Liz Ruby, Bernice Starr, and Kelly Trynor in Puerto Vallarta and Bahía de Banderas.

Table 70. Summary of Values and Attitudes among the Foreign Communities of Puerto Vallarta / Bahía de Banderas and Ajijic / Chapala

		Puerto Vallarta / BB	Ajijic / Chapala
Average age (years)		64%	70%
Immigration window			
Nationality	Canada	56.4%	27.1
	Estados Unidos	38.4%	66.2%
Education: Graduate degree		2.3%	40.6%
Residency	Permanente	24.0%	78.7%
	Seasonal	62.4%	13.5%
Retired		80.2%	92.0%
Owns home		50.7%	56.1%
Sense of safety (“A lot” + “Some”)		97.9%	95.5%
Recreational activities	Read books	Fourth place	First place
	Listen to classical music:	Fourth place	First place
	Listen to jazz:	Sixth lugar	Thirdr lugar
Feels “very happy”		64.2%	55.3%
Life satisfaction (arithmetic mean)		8.59	8.36
Thinks *“Most people can be trusted”*		63.2%	70.4%
Member of the H*umanitarian/Charity Organization*		49.8%	58.7
Member of an *Expatriate Club*		19.9%	49.4%
Takes part in philanthropic activity		44.1%	83.7%
Religious affiliation	Yes	38.0%	32.6%
	No	61.3%	66.7%
Importance of God in life (mean)		5.49	4.83
Abortion (pro-choice)		72.2%	84.3%
In favor	1.Decriminalizing only marijuana	57.4%	56.9%
	2. Decriminalizing all drugs	17.5%	29.6%
	1+2	74.9%	86.5%

		Puerto Vallarta / BB	Ajijic / Chapala
Same-sex marriage	In favo	59.3%	67.7%
	Opposed	4.7%	4.5%
	Indifferent	30.3%	26.3%
Interest in politics (Very interested / Interested)		77.2%	80.7
Democracy preferable to any form of government		81.2%	93.7%
Self-placement on the political spectrum	Left	48.1%	77.6%
	Right	35.8%	17.3%
	Far left	29.0%	55.8%
Self-placement on the Liberal–Conservative axis	Liberal	41.5%	59.4%
	Conservative	27.4%	14.8%
Identifies with a political party (Yes)		36.8%	52.9%
Party identification (among those who answered "Yes")	Canada		
	Liberal Party	25.4%	46.4%
	Conservative Party	40.0%	14.3%
	New Democratic Party (NDP)	16.3%	14.3%
	USA		
	Democratic Party	56.0%	83.2%
	Republican Party	22.5%	8.4%
	Independent	13.0%	4.8%

The similarities and differences in the demographic, social, cultural, and political profiles—what these communities share and what they do not—were described in Part Two of this book. Base on that analysis, several conclusions can be drawn. We observe, for example, further divergences of a sociodemographic nature (Table 70). We found that both groups are composed predominantly of members of the *Baby Boomer* generation, with somewhat greater intergenerational diversity—in light of a slightly larger presence of *Millennials* and *Generation X*—in Puerto Vallarta/BB than in Ajijic/Chapala. The higher average age of foreigners in the latter suggests one of three scenarios: (1) *Baby Boomers* will gradually be replaced by *Generation X* and *Millennials* as they reach retirement

age, with the overall size of the community holding steady; (2) such replacement will not occur and the community will progressively shrink; or (3) a combination of both, in which generational replacement does occur but total foreign population still declines. The recent, rapid upturn in the number of expatriates in Ajijic/Chapala may point to the first scenario. Conversely, the declining incorporation of new expatriates in Puerto Vallarta/BB could indicate the third: generational replacement accompanied by an overall decrease in the foreign population.

We also noted the hypothesis that factors such as nationality and educational attainment among foreigners are reflected in the values of other key variables throughout the analysis. The divergence on these variables between the two communities is linked, first, to the fact that in Puerto Vallarta/BB Canadians (56.4%) outnumber U.S. citizens (38.4%), whereas in Ajijic/Chapala the reverse holds: U.S. citizens (66.2%) outnumber Canadians (27.1%). Hence, in the first case—Puerto Vallarta/BB—one observes, for example, a community whose opinions are somewhat more balanced on controversial moral and political issues. Second, we found that average educational attainment is higher in Ajijic/Chapala than in Puerto Vallarta/BB. A comparison of the share with graduate studies (master's and doctorate) suffices: roughly 40% in the former, versus just 2.3% in the latter—an abyssal difference. This disparity appears to tilt the balance toward a more clearly defined social, cultural, and political identity oriented in a progressive and liberal direction.

As *retirement communities*, pensioners account for 69.2% of foreigners in Puerto Vallarta/BB and, primarily due to the higher average age, 77.4% in Ajijic/Chapala. These are people whose identities and value systems were shaped during the cultural movements of the 1960s and 1970s—and their aftershocks in subsequent decades—i.e., a period marked by a *progressive* mindset, consolidated in general by high levels of education. The influence is more pronounced in Ajijic/Chapala, given its exceptional educational profile, but it is also present in Puerto Vallarta/BB, as observed in both communities' lifestyles and cultural consumption (music, film, and books). There are, however, differences. In Ajijic/Chapala we observed more "refined" tastes, so to speak—e.g., in music, where *classical music* ranks first and jazz third out of a list of 17 genres. In Puerto Vallarta/BB, by contrast, *classical music* ranks fifth and *jazz* sixth. Reading

books is the leading recreational activity among foreigners in Ajijic/Chapala, whereas in Puerto Vallarta/BB *reading* ranks fourth. Likewise, *historical cinema* is the third most preferred film genre among expatriates in Ajijic/Chapala, but only sixth in Puerto Vallarta/BB.

The literature on *retirement migration* traditionally privileges economic motives and living conditions as reasons for leaving one's country of origin. In our study, however, while the *cost of living* is indeed an important reason, it is surpassed by others such as climate, natural landscape, the treatment received from local people, Mexican culture and customs, and a tranquil pace of life. We argue that, perhaps because the low cost of living is taken for granted, the evaluation of other reasons *improves* by comparison. Fulfillment of these expectations obviously allows access to a better *quality of life*, but also to a more satisfying *lifestyle,* in a context where the various *conditions* of residence are more than adequate. Access to housing is relatively attainable (56% in Ajijic live in their own homes; the figure is 50% in Puerto Vallarta), and different aspects of housing are rated from good to very good. Access to health services is likewise uncomplicated, and both prices and quality receive high marks from foreigners.

We also found that "reserves" of *social capital* are substantial and significant among expatriates in both foreign communities (Putnam, 2003). The components considered were *interpersonal trust, associational life, philanthropy*, and *volunteerism*—resources that foster civic and solidarity networks among expatriates and between expatriates and the local population. Interpersonal trust ("most people can be trusted") is higher in Ajijic/Chapala (70.4%) than in Puerto Vallarta/BB (63.2%). Since Americans exhibit similar levels of trust in both localities (around 70%), the difference between Vallarta and Ajijic is explained by Canadians in Ajijic (72.3%) expressing more trust than their compatriots in Puerto Vallarta (61.4%). In both communities, Americans and Canadians *far exceed* the interpersonal trust levels reported by their compatriots in the United States (37%) and Canada (46.7%). Moreover, expatriate associational activity is concentrated largely in humanitarian or charitable organizations, i.e., philanthropic associations (49.8% of foreigners in Puerto Vallarta and 58.7% in Ajijic/Chapala report *belonging*).

The gap is much wider when it comes to "*participation* in philanthropic activities": 44.1% in Puerto Vallarta versus 84% in Ajijic. Numerically, the participatory philanthropic vocation of foreigners in Ajijic/Chapala nearly doubles that in Puerto Vallarta/BB. In parallel, another major difference appears in membership in "expatriate clubs" (20% in Puerto Vallarta versus 49.4% in Ajijic/Chapala). We infer that the comparatively lower number of expatriate-club members in Puerto Vallarta relates to the smaller share of permanent residents, who are also dispersed across a much wider geographic area. Other variables show that foreigners in both places are open and willing to become part of the local communities and to participate in everyday interactions between expatriates and Mexicans (about 75% so report in both localities).

For these reasons—at least in part—expatriates in both communities also register very high levels of self-perceived *subjective well-being*. On a 1–10 scale, the arithmetic mean for *life satisfaction* is practically the same in both places: 8.59 in Puerto Vallarta/BB and 8.36 in Ajijic/Chapala. In both communities, Americans are slightly more satisfied than Canadians. Overall, Canadians and Americans living in the two Jalisco localities report greater satisfaction than their compatriots living in Canada and the United States. We observed something similar with respect to happiness: "*happy*" and "*very happy*" are 94% in Puerto Vallarta/BB and 92% in Ajijic/Chapala. The picture changes when focusing on those who report being "*very happy*": here Puerto Vallarta is higher at 64.2% versus 55.3% in Ajijic/Chapala. Americans are somewhat happier than Canadians in both communities, and expatriates of both nationalities are much happier than their compatriots in the United States (where only 19.5% report being "*very happy*") and Canada (28.4%). Many factors obviously shape these sentiments and emotions; but given that U.S. and Canadian expatriates report far higher levels of satisfaction and happiness than their respective home populations, a decisive factor can be reasonably inferred to be their residence in Ajijic or Puerto Vallarta. There they find living *conditions* compatible with their economic means that afford an improved *quality* of life and more satisfying life*styles*. Finally, the deep sense of community implied by reserves of social capital also contributes substantially to perceived well-being, thanks to the war-

mth it lends interpersonal relations and the moral support derived from mutual trust and solidarity.

In Part Two we also analyzed survey information relating to the cultural and political identity of expatriates. A fundamental element of cultural identity is religion and religiosity. In general, in both communities, membership in a religious denomination or church is rather limited—only about one-third of foreigners—and a similar share considers themselves religious. Conversely, 61% in Puerto Vallarta and 66.7% in Ajijic/Chapala do not belong to any religion or church, and thus neither profess a religious creed nor consider themselves religious.

These findings speak to a highly secularized social and cultural context—one we believe has fostered informed, non-prejudicial evaluation of salient cultural issues that nonetheless carry undeniable controversy. Dominant opinion on these matters confirms the image of liberal and *progressive* communities that, broadly speaking, ground their moral judgments in informed and unprejudiced assessments. With respect to voluntary termination of pregnancy *(abortion)*, for example, the share of expatriates who support a woman's freedom to decide *(pro-choice)* is 72.2% in Puerto Vallarta/BB and rises to 84.3% in Ajijic/Chapala. Evidently, there is little room for significant influence from the opposing *(pro-life)* position. We find a similar pattern regarding same-sex marriage: 59.3% of expatriates in Puerto Vallarta/BB and 67.7% in Ajijic/Chapala *support* this form of union. *Opposition* is minimal—just 4.7% in Puerto Vallarta and 4.5% in Ajijic. The remainder are *indifferent*; while they do not endorse it, neither do they oppose it. Finally, expatriate opinion also leans overwhelmingly toward drug legalization: 57.4% in Puerto Vallarta/BB and 56.9% in Ajijic/Chapala *favor* legalizing *marijuana*, while 17.5% and 29.6%, respectively, support legalizing *all drugs*. The combined shares (marijuana-only plus all drugs) yield 74.9% and 86.5%, respectively, in favor of legalizing all substances currently prohibited by law.

We also verified that *political identity* reinforces and coheres with the prevailing value system in both expatriate communities. First, interest in *politics* is high: 77.2% in Puerto Vallarta and 80.7% in Ajijic report being *interested.* These levels of engagement exceed those observed in the general populations of the United States and Canada. Such degrees of political involvement may

be interpreted as a fundamental support for the *democratic identity* of expatriates in both communities studied. In this regard, *democracy is preferable to any other form of government* for 81.2% of expatriates in Puerto Vallarta/BB, a share that rises to 93.7% in Ajijic/Chapala. Consistent with this, *liberal* and *democratic-left* identifications predominate among expatriates; and, in line with the broader trends observed, Ajijic/Chapala registers more liberals (59.4%) and left-identifiers (77.6%) than Puerto Vallarta/BB (where 41.5% identify as liberal and 48.1% as left). It is also worth noting that 29% place themselves on the far left in Puerto Vallarta/BB, compared with 55.8% in Ajijic/Chapala—nearly double.

Finally, party identification *(Party ID)* can be seen as a logical coda, likewise consistent with this value system. Recall that *identification with any political party* is reported by 36.8% of expatriates in Puerto Vallarta/BB, compared with 52.9% in Ajijic/Chapala. Considering *all respondents* from the United States, in Puerto Vallarta/BB 29.2% identify with the Democratic Party, 11.5% with the Republican Party, and 6.8% as Independents. The corresponding figures in Ajijic/Chapala are 53.1% Democratic, 5.5% Republican, and 1.6% Independent—an overwhelming predominance of Democrats among Americans. Among Canadians, for their part, in Puerto Vallarta 6.6% identify with the Liberal Party, 4.4% with the New Democratic Party (NDP), 1.3% with the Green Party, and 10.1% with the Conservative Party. Thus, Conservatives predominate; yet if we add *Liberals* and *New Democrats*—who share much of their policy platform—the resulting 10.5% ties Conservatives. In Ajijic/Chapala, Canadian party identification shifts: 13.7% prefer the Liberal Party, 3.7% the NDP, and 3.5% the Conservative Party. Liberals now far outnumber Conservatives; and if we sum Liberals and New Democrats (17.4%), Conservatives are left far behind at 3.5%. These proportions are corroborated when, as in the book's final chapter, we look only at the segment that **DOES** identify with a party: among Americans in Puerto Vallarta/BB, 56% identify with the Democratic Party, 22.5% with the Republican Party, and 13.0% as Independents; in Ajijic/Chapala, *Democrats* rise to 83.2%, Republicans fall to a distant 8.4%, and Independents stand at 4.8%. For Canadians who do identify with a party, in Puerto Vallarta/BB 25.4% choose the Liberals, 16.3% the NDP, and 40.0% the Conservatives—Conservatives

predominate, but Liberals plus New Democrats total 41.7%. Among Canadians in Ajijic/Chapala, the Liberal Party leads with 46.4%, followed by the NDP at 14.3%, and the Conservatives at just 14.3%.

We have dwelt at length on party identity to firmly establish the final salient feature distinguishing the foreign communities of Puerto Vallarta/BB and Ajijic/Chapala—one that, together with the cultural variables, yields a similar yet contrasting portrait: highly educated, culturally motivated communities, satisfied and happy, with affordable, high-quality living conditions, and a value system reflecting informed individuals, generally free of prejudice, with reflective and secular moral judgments; culturally liberal and progressive identities; and a clearly democratic *political identity* tilted to the *left* of the political spectrum. All of this culminates in party identification patterns marked by the predominance of the Democratic Party among Americans and of the Liberal Party among Canadians residing in Ajijic/Chapala (whereas in Puerto Vallarta Conservatives predominate—though even there the partisan ideological tilt is Liberal–New Democratic).

Across almost all survey dimensions and variables, the Ajijic/Chapala foreign community registers higher differential scores. This may be interpreted to mean that a greater cultural and identity *consensus* prevails there, leading to stronger interpersonal bonds, a more decisive capacity for collective action, and, in sum, more effective *Agency.* Although there are important expatriate clubs and associations in Puerto Vallarta and throughout Bahía de Banderas—and their work is very important—the emblematic case of the *Lake Chapala Society* perfectly exemplifies what this book has shown throughout.

Appendix

Appendix 1

The sample size in both localities was calculated using the following conventional formula:

Confidence level: 95%
Margin of error: 5%

$$n = \frac{K^2 q p N}{e^2(n-1)+K^2 pq}$$

where:
N = population (universe) from which the sample is drawn
e = margin of error
K = confidence coefficient
p = probability of cases possessing a specific characteristic (here
q = probability of cases not possessing that characteristic (1−p)(1-p)(1−p)
n = sample size

Resulting sample sizes:
Ajijic/Chapala: 399 case
Puerto Vallarta/BB: 383 cases
The difference in case counts is due to the number of interviews discarded in the final tally.

Appendix 2.
Questionnaires

2.1 FRANCES

Enquête auprès de la communauté étrangère
(résidents permanents et temporaires)

1. (CARTE 1) Se référant à votre séjour à Chapala, lequel des points suivants correspond à votre cas personnel.

1 [ ] Résident permanent.

2 [ ] Résident temporaire chaque année.

Pendant quels mois?

3 [ ] Résident permanent, mais avec une certaine flexibilité de séjours en d'autres lieux.

4 [ ] Résident temporaire mais non pas à fréquence annuelle.

Quels mois de l'année visitez-vous habituellement Chapala?

5 [ ] D'autres options.

2. Depuis quelle année visitez-vous et résidez-vous habituellement à Chapala?

3. Quelle est votre nationalité

4. (CARTE 2) Par quelles voies avez-vous pris connaissance de Puerto Vallarta comme destination touristique attractive?

1. [ ] Par les amis ou la famille.
2. [ ] Agence de voyages.
3. [ ] Promotion dans la presse / les médias électroniques.
4. [ ] Internet.
5. [ ] Certains films. Lesquels?

5. Travaillez-vous actuellement ou êtes-vous à la retraite ? ou les deux à la fois?

1. [ ] Travail.
2. [ ] Retraité/e.

3. [ ] Retraité/e travaillant occasionnellement.

6. (CARTE 3) Quelle est votre principale source de revenu personnel

1. [ ] Pension.
2. [ ] Salaire ou compensation d'entreprise.
3. [ ] Pension et salaire ou compensation d'entreprise.
4. [ ] Pension et inversions financières.
5. [ ] Inversions en banque.
6. [ ] Autre.

7. Le domicile où vous résidez est:

1. [ ] Ma propriété.
2. [ ] En location.
3. [ ] Prêté.
4. [ ] Multipropriété.
5. [ ] Autre.

8. Avec qui vivez-vous à Puerto Vallarta?

1. [ ] Seul.
2. [ ] Avec votre partenaire.
3. [ ] Avec votre famille.
4. [ ] Avec des amis.
5. [ ] Autre.

9. Dans quelle mesure êtes-vous satisfait de chacun des aspects suivants de votre résidence temporaire ou permanente: (utilisez une échelle de 1 = pas du tout satisfait, à 10 = complètement satisfait):

Prix d'achat	
Prix de location	
L'emplacement	
Dimensions spatiales (taille)	
Le style architectural	
Autre:	

10. (CARTE 4) Où se trouve votre résidence….

Conchas Chinas		Marina Vallarta	
Amapas		La montaña	
Zona Romántica		Nuevo Vallarta	
Zona Centro		Bucerías	
Gringo Gulch		La Cruz de Huanacaxtle	
Zona Hotelera		Punta de Mita	
Versalles/Fluvial		Autre:	

11. Pourriez-vous nous dire combien vous vous sentez en sécurité actuellement dans votre quartier?

1. [ ] Très sûr.
2. [ ] Assez sûr.
3. [ ] Peu sûr.
4. [ ] Pas du tout sûr.
0. [ ] NSP / NC.

12. En chiffres ronds, quel est votre revenu personnel par an en dollars américains.

1. [ ] Moins de 20 $
2. [ ] Entre 20 000 $ et 30 000 $
3. [ ] Entre 30 000 $ et 60 000 $
4. [ ] Entre 60 000 $ et 100 000 $
5. [ ] Plus de 100 000 $

13. Vos dépenses habituelles par mois (en dollars américains):

Nourriture	
Logement (loyer)	
Services de logement (électricité, eau, entretien, Internet, TV, téléphone)	
Transport	
Divertissements	
Services de santé et médicaments	
Vêtements et chaussures	
Dons et philanthropie	
Autre:	

14. Comment résolvez-vous vos problèmes de santé au Mexique?

1. [ ] Par l'assurance IMSS /par une assurance populaire.
2. [ ] Par une assurance médicale privée.
3. [ ] Payant les soins médicaux privés de ma propre bourse.
4. [ ] Par une couverture nationale de santé de mon pays d'origine.

15. Avez-vous eu besoin de services médicaux à Puerto Vallarta?

1. [ ] Non.
2. [ ] Oui. Si oui, veuillez évaluer les aspects suivants:

	Mauvaise	Passable	Bonne	Excellente	Ne s 'applique pas
Qualité des médecins					
Qualité des infirmières / et du personnel en générale					
Qualité de l'hôpital / clinique					
Coût des médecins					
Coût de l'hôpital / clinique					

(CARTE 6) Quelle est l'importance de chacune des raisons suivantes pour choisir Puerto Vallarta comme lieu de résidence temporaire ou permanente : veuillez évaluer l'importance de chacune d'elles avec l'échelle de 1 (pas important) à 10 (très important).

La beauté du paysage (montagnes, mer, jungle, rivières, ciel, îles)	
Le temps	
L'arrivée annuelle des baleines	
La Vieille Ville	
La réception de la part de la population locale	
La culture et les coutumes du Mexique	
Le mode de vie particulier de Puerto Vallarta	
La tranquillité avec laquelle on y vit	
Les activités artistiques et culturelles offertes en PV	

Films qui ont été tournés en PV	
Cuisine mexicaine et internationale	
Vie nocturne	
La diversité des options de divertissement	
L'atmosphère de tolérance et de diversité	
Les villes magiques de la région (Mascota, Talpa, Saint-Sébastien, Sayulita)	
La proximité de votre pays d'origine	
Facilités de migration	
Le coût de la vie	
La diversité des options de consommation	
Facilité d'accès aux services financiers	
La variété et le coût des services médicaux et hospitaliers	
Le coût du logement et de l'immobilier	
Accès aux activités de votre religion	
Participation à des associations bénévoles	
Participation à des clubs d'expatriés	
Convivance avec des amis et des proches	

17. (CARTE 7) Parmi les activités récréatives suivantes, lesquelles faites-vous et à quelle fréquence?

	Très souvent	Avec une certaine fréquence	Occasionellement	jamais ou presque jamais
Aller à la plage				
Nager dans la piscine				
Faire de la pêche				
Visitez les lieux à proximité				
Visitez les marchés locaux				
Participer à des festivals de fins philantropiques				
Jouez au golf, au tennis ou à un autre sport similaire				
Randonnée				

Faire du vélo					
Allez au gymnase, pratiquez le yoga, la méditation, etc.					
Allez au spa, recevez des massages					
Sports extrêmes ou de montagne					
Activités nautiques ou sportives					
Flaner en ville					
Alle aux restaurants					
Visiter des bars					
Rencontrer des amis ou la famille					
Aller au cinéma ou au théâtre					
Assister à des événements publiques (défilés, festivals, etc.)					
Assister à des fêtes religieuses					
Regarder la télévision chez soi					
Écouter de la musique chez soi					
Lecture					
Visiter les attractions touristiques du lieu					
Aller à l'église ou participer à d'autres manifestations religieuses.					
Autres activités:					

18. (CARTE 8) Veuillez indiquer à quel point vous êtes en accord ou désaccord avec les affirmations suivantes:

	Totalment en désaccord	En désaccord	Indécis/e	D'accord	Entièrement d'accord
La plupart de mes amis sont étrangers					

Les étrangers contribuent à l'amélioration de la communauté					
Je me sens plus à l'aise de faire des affaires avec d'autres étrangers					
Je sens que je suis bien accueilli par la communauté locale					
Je m'efforce de faire partie de la communauté locale					
Certaines personnes de population locale ont des ressentiments contre les étrangers					
Quelques Mexicains d'ici ont tiré profit de ma personne					
J'ai eu une relation étroite, d'amitié ou d'amour, avec certains mexicains d'ici					

19. Appartenez-vous à une confession religieuse?

1. [ ] Non.
2. [ ] Oui.

20. Oui, laquelle?

1. [ ] Catholique.
2. [ ] Protestante.
3. [ ] Orthodoxe (russe / grec / etc.).
4. [ ] Juive.

5. [ ] Musulmane.
6. [ ] Hindoue.
7. [ ] Bouddhiste.
8. [ ] Autre:

21. À part les mariages et les funérailles, à quelle fréquence allez-vous à la messe ou assistez à des services religieux?

1. [ ] Plus d'une fois par semaine.
2. [ ] Une fois par semaine.
3. [ ] Parfois par mois.
4. [ ] Uniquement les jours spéciaux.
5. [ ] Une fois par an.
6. [ ] Moins d'une fois par an.
7. [ ] Jamais ou presque jamais.

22. Que vous alliez ou non à l'église, diriez-vous que vous êtes:

1. [ ] religieux.
2. [ ] non religieux.
3. [ ] Un athée.

23. (CARTE 9) Quelle place tient Dieu dans votre vie ? Veuillez utiliser l'échelle suivante pour répondre. 10 signifie «Très important» et 1 signifie «Sans importance».

Sans importance									Très important
1	2	3	4	5	6	7	8	9	10

24. En termes généraux. Diriez-vous que vous êtes:

1. [ ] Très heureux.
2. [ ] Assez heureux.
3. [ ] Peu heureux.
4. [ ] Malheureux.

25. Etes-vous actuellement:

1. [ ] Marié.
2. [ ] Dans l'union libre.
3. [ ] Divorcé.
4. [ ] Séparé.
5. [ ] Veuf.
6. [ ] Célibataire.

26. (CARTE 10) En général, dans quelle mesure êtes-vous satisfait ou insatisfait de votre vie à présent ? Sur une échelle de 1 à 10, où 1 est "Complètement insatisfait" et 10 "Complètement satisfait.

Complètement insatisfait									Complètement satisfait
1	2	3	4	5	6	7	8	9	10

27. (CARTE 11) Les personnes s'informent de l'actualité de leur pays ou d'autres pays de sources différentes, Veuillez nous dire à quelle fréquence vous consultez les sources suivantes:

	Quotidiennement	Chaque semaine	mensuelment	moins que mensuelment	jamais
Journaux					
Magazines imprimés					
Bulletins de nouvelles tv					
Radio Informations					
Le téléphone cellulaire					
Courrier					
Internet					
Conversations avec des amis ou des collègues					

28. (CARD 12) En parlant de questions controversées, de quel côté de l'échelle suivante votre opinion personnelle penche-t-elle sur la question particulière de l'avortement?

Pro-choix									Providad
1	2	3	4	5	6	7	8	9	10

0. [ ] NS/NC

29. Etes-vous pour, contre ou indifférent au mariage entre personnes du même sexe?

1. [ ] En faveur.
2. [ ] Contre.
3. [ ] Indifférent.
0. [ ] NS/NC.

30. Actuellement on discute beaucoup les objectifs des prochaines décennies de votre pays. Lequel de ces objectifs a de plus ou de moins d'importance pour vous?

	Premier	Deuxième
Maintenir l'ordre de la nation		
Accorder à la population d'avantage de possibilités de verbaliser ses opinions quant aux décisions prises par son Gouvernement		
Lutter contre la hausse des prix		
Protéger la liberté d'expression		

31. Si la décriminalisation des drogues illicites devait être envisagée, quelle serait votre suggestion?

1. [ ] Dépénaliser seulement la marijuana.
2. [ ] Décriminaliser toutes les drogues illicites.
3. [ ] Ne pas décriminaliser pas les drogues illégales.
0. [ ] NS/NNC.

32. D'un point de vue générale : Pensez-vous que l'on puisse faire confiance à la plupart des gens ou doit-on s'en méfier?

1. [ ] On peut faire confiance à la plupart des gens.
2. [ ] Vous devez être très prudent.
0. [ ] NS/NC.

33. Est-ce que vous vous intéressez à la politique?

1. [ ] Beaucoup.
2. [ ] Quelque peu.
3. [ ] Peu.
4. [ ] Pas du tout.

34. (CARD 14) En parlant politique, les gens mentionnent être de «gauche» ou de «droite». D'une manière générale, à quel point de l'échelle suivante, vous placeriez-vous?

A Droite									à gauche
1	2	3	4	5	6	7	8	9	10

0. [ ] NS/NC

35. En ce qui concerne l'identification avec les partis politiques. Vous identifiez-vous à un parti politique de votre pays?

1. [ ] Non.
2. [ ] Oui.

Oui, Quel parti?

36. Que pensez-vous : La démocratie est préférable à toute forme de gouvernement, ou faut-il donner préférence à un régime autoritaire?

1. [ ] La démocratie est préférable à toute forme de gouvernement.
2. [ ] Un gouvernement autoritaire peut être préférable.
3. [ ] Sans opinon.
0. [ ] NS/NC.

37. (CARTE 15) Maintenant, je vais vous présenter une liste d'associations bénévoles de différentes catégories. Pourriez-vous nous dire si vous êtes membre actif, inactif ou non adhérant d'une d'entre elles?

	1 Membre actif	2 Membre inactif	3 Non-appartenance
Église ou organisation religieuse			
Sports ou loisirs			
Activités éducatives, artistiques, musicales ou culturelles			
Syndicats			
Organisations protégeant l'environnement			
Associations professionnelles			
Organisations humanitaires ou caritatives			
Organisations des consommateurs			

	1 Membre actif	2 Membre inactif	3 Non-appartenance
Groupes de développement personnel ou d'entraide			
Clubs expatriés			
Une autre organisation:			

38. (CARTE 16) Considérant maintenant votre façon générale de penser, à quelle hauteur vous placez-vous de chacune des catégories suivantes, sur une échelle de 1 (Très proche) à 10 (Très loin).

	Très proche									Loin de loin
	1	2	3	4	5	6	7	8	9	10
Conservateur										
Libertaire										
Libéral										
Socialiste										
Autres:										

39. Participez-vous à une activité philanthropique à Puerto Vallarta?

1. [ ] Non.
2. [ ] Oui.

Si Oui:

1. [ ] En tant que membre actif d'une association.
2. [ ] En tant que donateur.
3. [ ] En tant que membre et donateur.

40. Ici, on vous présente deux propositions faites lors des discussions sur l'environnement ou la croissance économique. Laquelle d'entre elle reflète le plus fidèlement votre point de vue?

1. [ ] La priorité devrait être accordée à la protection de l'environnement, même si cela ralentit la croissance économique et entraîne des pertes d'emplois.
2. [ ] La priorité devrait être donnée à la croissance économique et à la création d'emplois, même au détriment, dans une certaine mesure, de l'environnement.
3. [ ] une autre réponse:

41. (CARTE 17) Passons aux thèmes culturels: lesquels des genres musicaux suivants ont votre préférence (Merci d'en sélectionner trois).

Salsa/rythmes tropicaux		Pop	
Boleros		Rap	
Rocher		Métal lourd	
Blues		Fonctionne	
Jazz		Folklore latino-américain	
Alternative		Hip hop	
Musique classique		Musique électronique	
Musique mexicaine		Country Music	
Un autre genre:			

42. (CARTE 18) Quelles catégories de films de la liste suivante ont votre préférence. Merci d'en choisir trois.

Action		Mystère	
Aventure		Cinéma politique	
Comédie		Romance	
Drame		Saga	
Crime		Science-fiction	
Fantasia		Thriller	
Cinémas historiques		Occidentale	
Cinéma d'horreur		Musical	
Dessins Animés		Satire	
Um autre genre:			

43. À quelle fréquence utilisez-vous votre ordinateur personnel?

1. [ ] Quotidiennement.
2. [ ] Plusieurs jours par semaine.
3. [ ] Plusieurs jours par mois.
4 [ ] Rarement en un an.
5 [ ] La vérité est, je ne sais pas comment utiliser l'ordinateur

44. Quel est votre niveau d'éducation?

1. [ ] Aucune éducation formelle.
2 [ ] Ecole Primaire.
3. [ ] Secondaire/Technique/Gymnase.

4. [ ] Lycée: lycée/Baccalauréat.
5. [ ] Collège communautaire/collège/autre enseignement supérieur.
6. [ ] Université.
7. [ ] Spécialisation avec diplôme.
8. [ ] Autre.

45. Âge.

46. Sexe.
1. [ ] Masculin.
2. [ ] Féminin.

2.2 INGLES

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1. (CARD 1) Speaking of your residence in Ajijic, which of the following is your personal case.
1. [ ] You live permanently in Ajijic.
2. [ ] You stay seasonally in Ajijic, every year.
   If so, which months?
3. [ ] You consider yourself a permanent resident, but you reside elsewhere for part of the year.
4. [ ] You usually stay seasonally in Ajijic, but not every year.
   If so, which months of the year do you usually visit Ajijic?
5. [ ] Other options.

2. Since which year have you visited or resided in Ajijic?

3. What is your nationality?

4. (CARD 2) How did you learn of Ajijic's existence as an attractive destination?
1. [ ] Friends.
2. [ ] Travel agency.
3. [ ] Internet.

4. [ ] Social networks.
5. [ ] Promotion in the press.
6. [ ] A movie or movies. If so, 4b. Which movie.
7. [ ] Other.

5. Are you currently working? are you retired? or both options.

1. [ ] Working.
2. [ ] Retired.
3. [ ] Retired, but work occasionally.

5b. If you work: In what?

6. (CARD 3) What is your main source of personal income.

1. [ ] Pension.
2. [ ] Wage or business remuneration.
3. [ ] Pension and wage or business remuneration.
4. [ ] Pension and financial returns (investments).
5. [ ] Financial returns (investments).
6. [ ] Other.

7. The house where you reside is:

1. [ ] Owned.
2. [ ] Rented.
3. [ ] Borrowed.
4. [ ] Timeshare.
5. [ ] Other.

8. Who do you live with in Ajijic?

1. [ ] Alone.
2. [ ] With a partner.
3. [ ] With family.
4. [ ] With friends
5. [ ] Other.

9. How satisfied are you with each of the following aspects of the house where you reside seasonally or permanently (use a scale of 1 if not satisfied, to 10 if completely satisfied):

	1	2	3	4	5	6	7	8	9	10
Purchase or rental price										
Location										
Spatial dimensions (size)										
Architectural style										
Other:										

10. (CARD 4) Where is the house where you reside seasonally or permanently?

Ajijc		Jocotepec	
Ajijic (floresta)		Riberas del Pilar	
Chula Vista		Chapala	
Racquet Club		San Antonio Tlacayapan	
Canacinta		San Nicolas de Ibarra	
San Juan Cosalá		Country Club Chapala	
El Chante		Other	

11. Could you tell me how secure you feel these days in your neighborhood?

1. [ ] Very secure.
2. [ ] Quite secure.
3. [ ] Not very secure
4. [ ] Not at all secure.
0. [ ] DK/NA.

12. In round numbers, in US dollars how much is your annual personal income.

1. [ ] Under $20,000.
2. [ ] Between $20,000 and $30,000.
3. [ ] Between $30,000 and $60,000.
4. [ ] Between $60,000 and $ 100,000.
5. [ ] More than $100,000.

13. Normally, how much do you spend (in equivalent USD) monthly, on.

	USD	Canadian Dollar	Mexican pesos
Food			
Housing (rent)			
Housing services (light, water, maintenance, internet services, TV, telephone)			
Transport			
Entertainment/Sporting activities			
Health and medication services			
Clothing and footwear			
Donations and philanthropy			
Other:			

14. How do you deal with health issues in México?

(you can choose more than one option).

1. [ ] I have IMSS/Seguro popular.
2. [ ] I have a private health insurance.
3. [ ] I pay out of my pocket for private medical service.
4. [ ] I count on my National Health care program back home.

15. Have you ever required medical care here?

1. [ ] No.
2. [ ] Yes. If yes, please rate the following:

	Poor	Fair	Good	Excellent	Not apply
Quality of doctors					
Quality of nurses/staff					
Quality of hospital/clinic					
Cost of doctors					
Cost of hospital/clinic					

16. (CARD 6) Which of the following reasons were important in choosing Ajijic as a place of seasonally or permanent residence: please rate the importance of each of the ONES YOU CHOOSE on a scale of 1 to 10.

	Calificación
The beauty of the landscape (mountains, Lake, jungle, rivers, sky)	
The weather	
Near Guadalajara	
The small town	
The treatment of local people	
The culture and customs of Mexico	
Ajijic's unique lifestyle	
The tranquility with which you can live	
The artistic and cultural activities that take place in Ajijic	
Near the airport	
Mexican and international cuisine	
Hot springs	
The wealth of entertainment options	
The atmosphere of tolerance and diversity	
The 'magic towns' of the region (Ajijic, Mezcala, Tonalá)	
The proximity to your home country	
Immigration facilities	
The cost of living	
The diversity of consumer options	
Ease of access to financial services	
The variety and cost of medical and hospital services	
The cost of housing and real estate	
Access to your religion's own activities	
Participation in voluntary associations	
Participation in expat clubs	

17. (CARD 7) Of the following recreational activities, WHICH do you perform in Ajijic and how often?

	Very frequently	Frequently	Occasionally	Almost never or never
Go to the lake				
Swim in the pool				
Go fishing				
Visit nearby places				
Visit the local markets				
Visit fund-raising festivals				
Play golf, Tennis, or some other similar sport				
Go hiking				
Go cycling				
Go to the gym, practice yoga, meditation, etc.				
Visit the spa, receive massages				
Participate in extreme or mountain sports				
Participate in water sports or activities				
Go walking in the village				
Eat in restaurants				
Visit bars				
Meet with friends or family				
Attend the cinema or theatre				
Attend free public events (Parades, Festivals, etc.)				
Attend religious festivities				
Watch TV at home				
Listen to music at home				
Read books				
Visit local tourist attraction				
Attend church or religious activities				
Go to hot springs				
Other activities:				

18. (CARD 8) Please indicate how much you agree or disagree with the following statements.

	Totally disagree	Disgree somewhat	Undecided	Agree somewhat	Totally agree
Most of my Friends are other foreigners					
Foreigners are helping improve the community					
I feel more comfortable doing business with other foreigners					
I feel welcomed by the local community					
I make an effort to be part of the local community					
Some local are resentful against foreigners					
I have been taken advantage of by some mexicans here					
I have had at least one close friend relationship with a Mexican here (friendship, love…)					

19. Do you belong to a religion or religious denomination?

1. [ ] No.
2. [ ] Yes.

If yes, which one?

1. [ ] Roman Catholic.
2. [ ] Protestant.
3. [ ] Orthodox (Russian/Greek/etc.).
4. [ ] Je.
5. [ ] Muslim.
6. [ ] Hindu.
7. [ ] Buddhist.
8. [ ] Other:

20. Apart from weddings and funerals, about how often do you attend religious services these days?

1. [ ] More than once a week.
2. [ ] Once a week.
3. [ ] Once a month.
4. [ ] Only on special holy days.
5. [ ] Once a year.
6. [ ] Less often.
7. [ ] Never, practically never.

21. Independently of whether you attend religious services or not, would you say you are:

1. [ ] A religious person.
2. [ ] Not a religious person.
3. [ ] An atheist.

22. (CARD 9) How important is God in your life? Please use this scale to indicate. 10 means "very important" and 1 means "not at all important."

Not at all important									Very important
1	2	3	4	5	6	7	8	9	10

23. Taking all things together, would you say you are.

1. [ ] Very happy.
2. [ ] Rather happy.
3. [ ] Somewhat happy.
4. [ ] Not at all happy.

24. Are you currently:

1. [ ] Married.
2. [ ] Living together as married.
3. [ ] Divorced.
4. [ ] Separated.

5. [ ] Widowed.
6. [ ] Single.

25. (CARD 10) And all things considered, how satisfied are you with your life as a whole, these days? Using this card on which 1 means you are "completely dissatisfied" and 10 means you are "completely satisfied" where would you put your satisfaction with your life as a whole?

Completely dissatisfied — Completely satisfied

1	2	3	4	5	6	7	8	9	10

26. (CARD 11) People learn what is going on in their own country and the world from various sources. For each of the following sources, please indicate whether you use it to obtain information daily, weekly, monthly, less than monthly or never:

	Daily	Weekly	Monthly	Less than monthly	Never
Daily newspaper					
Printed magazines					
TV news					
Radio news					
Mobile phone					
Email					
Internet					
Talk with friends or colleagues					

27. (CARD 12) Speaking of controversial issues, on the subject of abortion to which side do you personally lean?

Prochoice — Prolife

1	2	3	4	5	6	7	8	9	10

0. DK/NA

28. Are you for or against same-sex marriage, or are you indifferent.

1. [ ] In favor.
2. [ ] Against.
3. [ ] Indifferent.
0. [ ] DK/NA

29. (CARD 13) People sometimes talk about what the aims of this country should be for the next ten years. On this card are listed some of the goals which different people would give top priority. Would you please say WHICH ONE of these YOU, yourself, consider THE FIRST MOST important? And which would be the SECOND MOST important?

	First	Second
Maintaining order in the nation		
Giving people more say in important government decisions		
Fighting rising prices		
Protecting freedom of speech		

30. If the decriminalization of drugs were to be raised, would you think.

1. [ ] That only marijuana be decriminalized.
2. [ ] That all currently illegal drugs are decriminalized.
3. [ ] Do not decriminalize any currently illegal drugs.
0. [ ] DK/NA

31. Generally speaking, would you say that most people can be trusted or that you need to be very careful in dealing with people?

1. [ ] Most people can be trusted.
2. [ ] Need to be very careful.
0. [ ] DK/NA

32. How interested would you say you are in politics? Are you

1. [ ] Very interested.
2. [ ] Somewhat interested.
3. [ ] Not very interested.
4. [ ] Not at all interested.

33. (CARD 14) In political matters, people talk of "the left" and "the right." How would you place your views on this scale, generally speaking?:

Left									Right
1	2	3	4	5	6	7	8	9	10

0. [ ] DK/NA.

34. Speaking of party identification, do you identify yourself with any political party?

1. [ ] No.
2. [ ] Yes

If yes, which party.

35. What do you think: Is democracy preferable to any other form of government, or authoritarian government may be preferable?

1. [ ] Democracy is preferable to any form of government.
2. [ ] Authoritarian government may be preferable.
3. [ ] Don't care.
0. [ ] DN/NA.

36. (CARD 15) Now I am going to read off a list of voluntary organizations. For each organization, could you tell me whether you are an active member, an inactive member or not a member of that type of organization?

	1 Active member	2 Inactive member	3 Don't belong
Church or religious organization			
Sport or recreational organization			
Art, music or educational organization			
Labor Union			
Environmental organization			
Professional association			
Humanitarian or charitable organization			
Consumer organization			
Self-help group, mutual aid group			
Club or Expats Asociation			
Other organization:			

37. (CARD 16) Considering your way of thinking generally, would you say that you are:

Conservative	
Libertarian	
Liberal	
Socialist	
Other:	

38. Do you take part in some philanthropic activity in Ajijic

1. [ ] No.
2. [ ] Yes.

If yes. As?

1. [ ] As an active participant in some Association.
2. [ ] As a donor.
3. [ ] Both.

39. Here are two statements people sometimes make when discussing the environment and economic growth. Which of them comes closer to your own point of view?

1. [ ] Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs.
2. [ ] Economic growth and creating jobs should be the top priority, even if the environment suffers to some extent.
3. [ ] Other answer.

40. (CARD 17) Moving on to cultural themes, of the following music genres, which are the THREE you prefer the most (Choose only Three)

Salsa/ tropical rhythms		Pop	
Boleros		Rap	
Rock		Heavy metal	
Blues		Opera	
Jazz		Latin American folklore	
Alternative		Hip hop	

Classical music		Electronic music	
Mexican music		Country music	
Other genre:			

41. (CARD 18) Then there are different film genres. Which are the THREE you prefer the most (Choose only three).

Action		Mystery	
Adventure		Political	
Comedy		Romance	
Drama		Saga	
Crime		Science fiction	
Fantasy		Thriller	
Historical		Western	
Horror		Musical	
Animation		Satire	
Other genre:			

42. How often, if ever, do you use a personal computer?

1. [ ] Daily.
2. [ ] Several days in the week.
3. [ ] Several days in the month.
4. [ ] Few times in a year.
5. [ ] Don't know how to use a computer

43. What is the highest educational level that you have attained?

1. [ ] No formal education.
2. [ ] Primary school.
3. [ ] Secondary school/Thechnical/High sechool.
4. [ ] Secondary: university-preparatory type.
5. [ ] Community college/College/Other tertiary education.
6. [ ] University.
7. [ ] Postgraduate.
8. [ ] Other.

44. Age:

45. Sex

1. [ ] Male.
2. [ ] Female.

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Comparative study of the foreign communities of
Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala
Se terminó de editar en septiembre de 2026 en
La Unidad de Apoyo Editorial-CUCSH
José Parres Arias 150, San José del Bajío, Zapopan, Jalisco, México.

Tiraje: 1 ejemplar.

Imagen de portada: generada con inteligencia artificial mediante ChatGPT (OpenAI), 2026

Diagramación: Unidad de Apoyo Editorial-CUCSH

As the Editor of Lakeside's (and Jalisco's) only bilingual newspaper, I find the Comparative study of the foreign communities of Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala an invaluable tool. There are no studies about the Expat population here in Lakeside that I can refer to with confidence. What is available from other sources is mostly from the real estate and tourist industries and is not done with academic rigor. Marco Antonio Cortés Guardado Cecilia Soraya Shibya Soto and Michael Nolen have given me –and everyone– an academically rigorous and reliable snapshot of the population I serve. The comparson with PV is icing on the cake. We have republished parts of the study and continue to rely on it. The authors have done a real service in this study, and I will use it as a touchstone in reporting.

Patrick O'Heffernan

Executive Editor, Lakeside News.

"Comparative study of the foreign communities of Puerto Vallarta/Bahía de Banderas and Ajijic/Chapala" This ground-breaking study contributes fascinating new insights into some of the most interesting new "migration streams" impacting global development. Comparing two of the major Mexican locations for this migration –Puerto Vallarta/Bahia de Banderas and Ajijic/Chapala– in an academically rigorous investigation, this research establishes a baseline for studies and evolving demographic and political shifts going forward.

Lynn Gutstadt

Research Consultant, Former VP Audience Research CNN Networks Former Member of Board of Advisors, Population Media Center.

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CENTRO UNIVERSITARIO DE CIENCIAS SOCIALES Y HUMANIDADES

ISBN: 978-607-646-070-2