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Tourism, Wellness, and Life Satisfaction Among Retirees: A Study of the International Community in Mexico

Turismo, bienestar y satisfacción con la vida de los jubilados: un estudio de la comunidad internacional en México

Zepeda Hernández, Sandra Luz[1]

[1] El Colegio de Jalisco, México. sandra.zepeda@academicos.udg.mx

Abstract

Some of the earliest forms of travel for tourism were directly tied to health and well-being, a comprehensive concept that includes various aspects of a person's life, such as emotional, psychological, and social factors. This study examines the relationship between Objective and Subjective Well-being factors (OWB/SWB) and life satisfaction among retirees in Mexico. Specifically, the article investigates the international community in Chapala, known as one of the oldest destinations for North American retirees. Statistical analyses and hypotheses were evaluated using the Pearson correlation coefficient. The results reveal that the strongest correlations exist within the SWB factors, including the fulfilment of expectations and engagement with both international and local communities. In contrast, OWB factors, such as sanitation, safety, and environmental issues, show no correlation with life satisfaction. These findings illuminate the complex interplay of factors affecting retirees' life satisfaction in regions like Chapala and challenge conventional assumptions, prompting the tourism and retirement industry to reconsider its focus on environmental appeal and prioritize the development of supportive social and economic arrangements ecosystems.

Keywords: Retirement Migration, Second-Home Tourism, Wellbeing

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Resumen

Algunos de las formas más tempranas de viajes y turismo se encuentran relacionadas con salud y bienestar, un concepto amplio que incluye varios aspectos de la vida, tales como la emocional, psicológica y factores sociales. Este estudio examina la relación entre los factores de bienestar objetivo y subjetivo (OB/SWB) y la satisfacción con la vida de los jubilados en México. Específicamente, el artículo investiga la comunidad internacional en el municipio de Chapala, reconocido como uno de los destinos más antiguos para los jubilados norteamericanos. Los análisis estadísticos y las hipótesis se evaluaron utilizando el coeficiente de correlación de Pearson. Los resultados revelan que las correlaciones más fuertes están presentes dentro de los factores de bienestar subjetivo, incluido el cumplimiento de las expectativas y el compromiso con las comunidades internacionales y locales. En contraste, los factores OWB, como el saneamiento, la seguridad y los problemas ambientales, no muestran correlación con la satisfacción con la vida. Estos hallazgos exponen la intrincada interacción de los factores que afectan la satisfacción con la vida de los jubilados en regiones como Chapala y desafían los supuestos convencionales, lo que impulsa a la industria del turismo y la jubilación a reconsiderar su enfoque en el atractivo ambiental y, en cambio, priorizar el desarrollo de ecosistemas sociales y económicos de apoyo.

Palabras clave: Migración de retiro, Turismo de segundas residencias, bienestar

1 Introduction

The connection between thermal treatments and the discovery of the sea as a way to enhance health among affluent individuals is recognized as a precursor to the SPA,[1] the earliest form of nature-related tourism (César-Dachary et al., 2017). Consequently, some of the earliest forms of travel for tourists were directly tied to health and well-being (Walton, 1983). Well-being is a comprehensive concept that encompasses various aspects of a person's life, including emotional, psychological, and social factors; it generally denotes comfort, health, and happiness (Filep, 2014). In recent decades, the human journey driven by the desire for an improved or alternative quality of life, known as lifestyle migration (O'Reilly, 2000, 2003; Gustafson, 2008), has both expanded and diversified. These lifestyle movements are associated with the residential real estate market, as individuals who relocate often acquire second homes in areas distinct from their primary residences (Huete & Mantecón, 2017). The streams of lifestyle migrants and their

[1] Latin phrase *Sanitas Per Aquam,* translated as "health through water."

accompanying capital flow through both the global North and South, as well as urban and peripheral regions (Sigler & Wachsmuth, 2020).

International retirement migration (IRM) is a major global trend located at the intersection of aging, tourism, and migration (King et al., 2021). Individuals from the North migrate to the South, significantly impacting both sending and receiving countries. Mexico has emerged as the leading destination for North Americans moving to Latin America and ranks as the second most favoured international spot for Canadian visitors (IOM, 2022). Current estimates indicate that over a million Americans live in Mexico, a considerable number of whom are retirees (Stokes, 1990; Truly, 2002; Meyer, Sherman, & Deeds, 2017; Janoschka, 2009; Croucher, 2009). This trend continues to rise, driven by an estimated 10,000 baby boomers retiring daily in the United States, many of whom are interested in retiring overseas (King, Warnes, & Williams, 2000; Benson & O'Reilly, 2009; Raditsch, 2015; Dahl, 2019). The appeal of Mexico as a retirement haven stems from several factors, such as its affordable living costs, accessible healthcare, and pleasant climate (Truly, 2002; Torres & Momsen, 2005).

Chapala, a picturesque town in Jalisco, Mexico, is renowned for hosting one of the largest American expatriate communities in the country. Its history stretches back to a thriving pre-Hispanic settlement established in the 12th century. During the colonial period under Spanish rule, the region was primarily inhabited by indigenous populations. In the 19th century, Chapala was integrated into the territories of La Barca and Guadalajara before achieving municipal independence in 1939 (Instituto de Información Estadística y Geográfica IIEG, 2019).

According to Instituto Nacional de Estadística y Geografía (INEGI, 2020), Chapala has a population of around 55,196 people, distributed across 50 localities. Approximately 11% of the population lives in rural areas, while 89% reside in urban zones. As a key part of the Lake Chapala Riviera, the municipality is surrounded by seven other municipalities: Jocotepec, La Barca, Ocotlán, Tuxcueca, Poncitlán, Tizapán el Alto, and Jamay. Together, these areas form a vibrant and culturally rich region centered around the stunning Lake Chapala. In the late 1800s, Chapala started drawing foreign tourists thanks to its attractive geographical features. Research conducted by Swenson (1974), Holder (1977), and Stokes (1981) formed a foundation for understanding the social dynamics and motivations of American retirees, revealing that the picturesque natural surroundings were their primary draw in the latter half of the 20th century During the 1990s, the North American Free Trade Agreement (NAFTA) encouraged more Americans to migrate to the region, as they enjoyed access to goods and services comparable to those in their home country (Truly, 2002). This situation prompted various studies aimed at understanding the profiles and motivations behind North Americans' migration to Lake Chapala (Truly, 2001, 2002; Raditsch,

2015; Sunil, Rojas, and Bradley, 2007). The findings indicated that the primary motivation for migrating to Mexico was financial, slightly ahead of the allure of the natural environment (Sunil et al, 2007).

Studies on the social impacts of second homes, driven by lifestyle mobility, have emerged primarily in Spain with the work of Jurdao (1990). In Mexico, one of the first studies to address this topic is the pioneering work of Talavera (1982), specifically focusing on the Chapala region. More recently, the studies of Daniel Hiernaux (2010) have helped distinguish residential tourism from other types of tourism. However, the focus on territorial impacts has become more evident in works such as Lizárraga's (2019) examination of social and cultural impacts in destinations like Mazatlán, and Zepeda's (2024) study of Chapala. Both studies identify social polarization, privatization of public space, and environmental degradation in the receiving destinations as problems associated with second homes.

Official statistics on migration to Mexico are limited. For instance, estimates from the United States Embassy indicate that out of nine million Americans living abroad, approximately 1.6 million reside in Mexico (Department of State, 2020). The US government's inadequate data regarding its citizens overseas hampers statistical precision and a similar issue exists in other countries.

As the international retired community in Mexican towns grows every census, and the economic and social life is modified by these immigrant flows (Zepeda, 2024), this paper aims to determine the correlation between subjective and objective well-being factors and life satisfaction in Mexico for the international community in Chapala, Mexico. To achieve the objective, quantitative research was designed using statistical analyses, and hypotheses were evaluated with the Pearson correlation coefficient based on Subjective and Objective Well-Being Factors identified in the literature.

This article initially discusses the relationship between tourism, well-being, and life satisfaction, with a focus on elderly travellers. This serves as a foundation for identifying the objective and subjective factors of well-being related to travel and tourism, which in turn facilitates the operationalization of the study variables. Building on this, a research model and hypotheses are proposed. Next, the proposed methodology is outlined, along with the study variables, their measurement, and the analysis method based on the correlation coefficient. Finally, the results of the correlation tests are presented, beginning with the demographic characteristics of the studied population, followed by the outcomes of the hypothesis tests. The article concludes with discussions on the implications for research and practice.

2 Theoretical Framework

2.1. Tourism, Wellness, and Life Satisfaction

Some of the earliest forms of tourism were directly connected to health and well-being. Sunbaths, for example, were associated with good health due to the properties of seawater (Walton, 1983) gaining popularity in the early 20th century among the middle and upper classes. Nowadays, other activities such as golf, cycling, and yoga are also related to wellness and tourism across all markets under “health tourism” (Connell, 2006).

Well-being is frequently used interchangeably with wellness, a concept Dunn (1959) introduced as the antithesis of illness (Hartwell, 2016). At the same time, the terms “life satisfaction,” “quality of life,” or “well-being” are also used interchangeably in the literature (Assan et al., 2024; Altinay et al., 2019; Altinay et al., 2023a, 2023b; Kim et al., 2015; Sirgy, 2019).

The World Health Organization defines quality of life as “an individual’s perception of their position in life in the context of the culture and value systems in which they live and about their goals, expectations, standards and concerns” (WHO, 2012, p. 11). Also, "well-being" refers to a positive state that individuals and societies experience and “encompasses quality of life and the ability of people and societies to contribute to the world with a sense of meaning and purpose” (WHO, 2021, p. 10). From this perspective, understanding the relationship between tourism and health, wellness, and well-being is essential for successful tourist destinations, host communities, and overall destination experiences (Hartwell et al., 2016).

The concept of wellness tourism has evolved significantly over the past fifty years, marked by an expanding supply of wellness programs and a growing emphasis on the quality of wellness services. According to a bibliometric study conducted by Hartwell et al. (2016), literature in English language journals related to tourists and life satisfaction flourished in 2009, and three key themes were identified: 1) Well-being, 2) Wellness, and 3) Health and quality of life. Additionally, studies have highlighted unique health-promoting remedies offered by various destinations, such as marine therapies, thermal springs, and traditional Chinese medicine. This research also explores the impact of tourism on tourists' health and well-being. These findings expose the focus on health, personal care, and diverse cultural and relaxation programs within wellness accommodation (Hartwell et al., 2016).

As the global population ages, studies increasingly examine the relationship between tourism as a wellness agent and life satisfaction. According to the United Nations Department of Economic and Social Affairs (2022), for the first time in 2018, individuals aged 65 years or older outnumbered children under five. The report highlights that the population aged 65 years or older has tripled

since 1980, with the current 771 million people in this age group projected to double by 2050 (UN, 2022). Furthermore, depression was predicted to be the single most significant cause of illness by the year 2020 (Lopez et al., 2006) and might continue for the following years (McPhillips, 2023).

2.2. Well-being and Tourism Conceptual Framework

As argued above, well-being is used interchangeably with wellness (Hartwell et al., 2016). According to Mueller and Kaufmann (2001), "wellness tourism" relates to the "relationships and phenomena resulting from a journey and residence by people whose main motive is to preserve or promote their health" (Mueller and Kaufmann, 2001, p. 7; cited in Hartwell et al., 2016). On the other hand, Bushell and Sheldon (2009) define it as a holistic mode of travel that integrates physical health, beauty, longevity, spiritual awareness and a connection with community or nature.

On the other hand, well-being is generally viewed as a multi-dimensional concept, presented in two distinct ways: "objective" and "subjective" well-being (Delle-Fave & Masimini, 2005; Kahneman & Drueger, 2006; White, 2008). In this sense, well-being is a broad concept encompassing various dimensions of an individual's life, including emotional, psychological, and social aspects. It generally refers to being comfortable, healthy, and happy (Filep, 2014).

For Filep (2014), well-being also includes meaning in life as a crucial component of well-being. In this context, well-being can be understood through the lens of subjective well-being (SWB), which is often defined as the combination of life satisfaction and the presence of positive moods or emotions (Filep, 2014) a perspective that suggests that well-being is not solely about feeling good or experiencing pleasure but also involves engaging in activities that are personally meaningful and fulfilling.

In line with the above, Pearce, Filep and Ross (2011) conceive tourist happiness in terms of the three key phases of the travel experience: 1) anticipatory, 2) On-site, and 3) Reflective on the experience. Based on this, Filep's research (2014) indicates that tourists' happiness is linked to travel motivations such as relationship and belonging, safety and comfort, curiosity and mental stimulation, and self-development.

According to the above, the phases mentioned (anticipatory, on-site and reflective on the experience) influence the tourist happiness. In this sense, the attraction of a specific place to travellers can be influenced by the tourist imaginary. Tourist imaginaries can be defined as the representation and meanings of a space and its contents (Bachelard, 1957; cited in Debarbieux, 2003). That is, they are mental representations and collective perceptions of a destination, formed by images and stereotypes that influence the choice of place and the travel experience. Various

actors, including tourism promoters, the media, and the tourists themselves, influence these imaginaries.

More recently, in congruence with the above, Asan et al. (2024) state that subjective well-being (SWB) refers to how individuals experience the quality of their lives, including emotional reactions and cognitive evaluations. It encompasses several key components, such as Life Satisfaction (as a cognitive aspect of SWB), Positive and Negative Affect (positive and negative emotions experienced at the host destination), and Overall Quality of Life (including subjective experiences and objective conditions) (Asan, 2024; Hartwell et al. 2016).

On the other hand, objective well-being (OWB), related to objective conditions, relates to ideas of the fulfillment of materialistic demands and access to physical, environmental, social and other resources (Hartwell et al., 2016). It also refers to the measurable and observable aspects of an individual's quality of life, which can be assessed through various external indicators (Asan et al., 2024). According to this, several components of objective well-being include economic indicators, health status, living conditions, social and environmental factors, and cultural and political context (Asan et al., 2024). In other words, the objective of well-being includes income levels, access to healthcare services, quality of housing, clean water, sanitation, and safe neighbourhoods. Also, it involves social support networks, community engagement, political stability, and cultural opportunities (Asan et al., 2024).

2.3. Wellness tourism, and life satisfaction in senior travellers

Wellness tourism related to senior individuals has shown that travel experiences can positively influence life satisfaction among older adults (Lee, 2018; Pan et al., 2020). Participation in leisure and tourism activities can, therefore, be a vital solution to mitigate loneliness and help re-build social relations, thus enhancing life expectancy and quality of life (Dann, 2002; Kan et al., 2022; Kim et al., 2021; Liang et al., 2021; Morgan et al., 2015; Shergold, 2019).

Kan et al. (2022, 2023) specifically explored the increasing trend of wellness tourism among older adults, focusing on how various factors—such as sharing local culture, altruistic values, and perceived enjoyment—affect their satisfaction and overall quality of life. Their findings from a hot spring hotel in Taiwan indicate that participating in wellness tourism activities provides emotional relief, a sense of security, and positively influences their quality of life. In this context, sharing local culture fosters a deeper connection and understanding of the travel experience. At the same time, altruistic values enhance the perceived benefits of wellness tourism, contributing to greater enjoyment and satisfaction among older travellers. Therefore, wellness tourism can be an effective way for elderly individuals to maintain their health and enhance their well-being.

As previously addressed, one definition of "life satisfaction" refers to individuals' overall assessment and contentment regarding their life experiences, particularly in travel and tourism activities. It is a key component of subjective well-being (SWB) (Bimonte, 2023; Filep, 2014) and is often measured by individuals' evaluations of their experiences during and after their trips (Filep, 2014). Bimonte (2023) reinforces this approach to life satisfaction in tourism based on his research findings in Italy with senior travellers. He states that life satisfaction is a subjective evaluation of one's overall well-being and quality of life. Furthermore, life satisfaction in tourism is influenced by various factors, including social comparisons, environmental settings, and the activities individuals engage in during their leisure time (Bimonte, 2023).

On the other hand, Asan et al. (2024), in their study related to the connectedness of nature and the life satisfaction of seniors in tourism, states that tourism significantly affects seniors' life satisfaction. Moreover, seniors who engage in nature-based tourism will likely experience higher levels of connectedness to nature, contributing to their overall well-being and satisfaction with life.

As observed from the well-being approach, life satisfaction encompasses subjective and objective indicators. In this sense, subjective indicators in senior travellers may include personal adaptation to retirement, happiness, tranquillity, and current life conditions (Pickard et al., 2018; Su et al., 2018; Suhartanto et al., 2019). Objective indicators relate to an individual's overall contentment with life (Bimonte, 2023). According to this, understanding life satisfaction is complex, as it is not easy to directly reflect feelings of a high quality of life, with travel being a significant predictor of life satisfaction levels, especially for the elderly.

According to all the above, Table 1 proposes a scheme of factors influencing the life satisfaction of elderly people in travel and tourism, based on the scope of wellness tourism and the well-being concept addressed, including both dimensions: Subjective well-being and Objective well-being.

Table 1. Factors influencing the life satisfaction of elderly individuals in travel and tourism

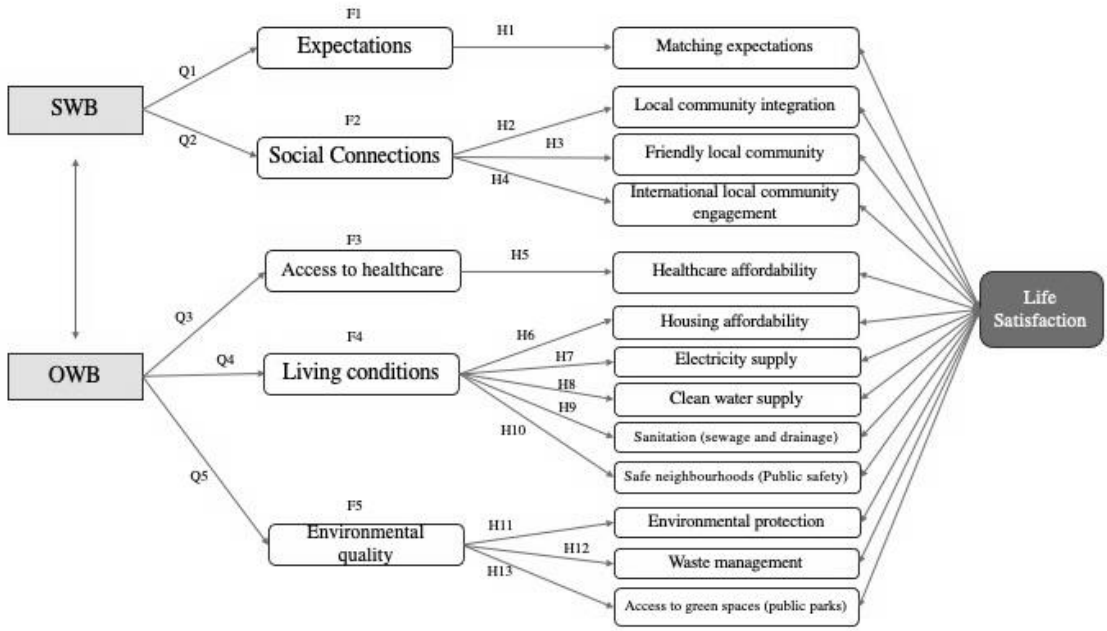
Life Satisfaction in Tourism and Travel	Subjective well-being (SWB)	Emotional & cognitive evaluation	▪ Expectation vs. reality. ▪ Quality of experience ▪ Post travel reflections ▪ Social connections in host destinations and during travel.
	Objective well-being (OWB)	Materialistic demands	▪ Income level ▪ Access to health services

			▪ Living conditions ▪ Political stability ▪ Cultural opportunities ▪ Environmental quality

Source: Own elaboration based on Asan et al., 2024; Hartwell et al., 2016 Filep, 2014; and Bimonte, 2023

Therefore, life satisfaction in tourism can be influenced by several factors, including quality of experiences, expectations versus reality, post-travel reflections, and social connections during travel (Filep, 2014). In this sense, quality of experiences refers to the enjoyment and fulfillment of travel activities, accommodations and interactions during the trip. Also, the expectations and how well a travel experience meets or exceeds them can affect their life satisfaction, as well as how individuals reflect on their travel experiences after returning home, and the meaningful memories and the perceived value of the experience contribute to long-term satisfaction. Social connections refer to the relationships and connections formed during travel, whether with fellow travellers or locals and how they may enhance life satisfaction by providing a sense of belonging and community.

Figure 1. Research model



Source: Author.

Based on the studied concepts, the identified factors influencing subjective and objective well-being, which contribute to life satisfaction, form the foundation of the research model guiding this study.

To design the research model, the following factors were considered: Expectations, Social Connections, Access to healthcare, and Living conditions and environmental quality, which have been operationalized through constructs that comprise each dimension (SWB–OWB). Accordingly, Figure 1 confirms the description of the key structures and their relationship examined in this study.

2.5. Development of research hypotheses

The consulted literature recognizes that tourism, as a leisure activity, significantly contributes to well-being and enhances life satisfaction, particularly among the elderly (Kan et al., 2022, 2023; Filep, 2014; Hartwell et al., 2018; Bimonte, 2023; Kim et al., 2021; Dann, 2002).

Therefore, building on the aforementioned line of investigation and empirical findings on the factors correlated with life satisfaction in host destinations for long- and mid-term international residential tourists, this study delves into the relationship between this type of tourism and wellness within the scope of the well-being concept. Hence, the theoretical interpretation has its roots in well-being tourism from the well-being concept studied. It distinguishes between subjective well-being (SWB) and objective well-being (OWB) and the valuation of the constructs related to SWB/OWB and life satisfaction while staying in the host country.

According to the research model (Figure 1), five factors, two SWB and three OWB factors, involved in the well-being and life satisfaction of elderly travellers and wellness tourism are studied: 1) Expectations, 2) Social connections, 3) Access to Healthcare, 4) Living conditions, and 5) Environmental quality.

As argued before, Life Satisfaction in tourism is a multifaceted concept influenced by several key SWB factors, such as the alignment between expectations and reality (Filep, 2014) since tourists and travellers often have preconceived notions about their destinations based on marketing materials, recommendations, and personal aspirations. When the experience meets or exceeds these expectations, tourists report higher satisfaction. Conversely, a significant disparity between expectations and reality can lead to disappointment and reduced satisfaction. Consequently, the first research question arises:

> Q1. Is there a correlation between matching expectations and life satisfaction in the host country?

This research question leads to hypothesis 1:

H1. A significant positive relationship exists between matching expectations in the host country and life satisfaction.

The second SWB factor is Social Connections. Social connections in host countries enhance the experience of international tourists by fostering a sense of belonging, cultural understanding, and overall satisfaction. As Filep (2014) and Asan et al. (2024) mentioned, building relationships with locals and other travellers leads to more fulfilling, authentic, and enriching journeys. Therefore, the second research question would be the following:

Q2. Is there a correlation between the social connections developed in the host country and the life satisfaction of residential tourists?

Three constructs have been developed based on the characteristics observed in the object of study. Therefore, three hypotheses were developed according to the constructs to answer this question.

H2. The willingness to integrate with local (native) people is significantly related to life satisfaction in the host country.

H3. The perception of friendly local (native) people is significantly related to life satisfaction in the host country.

H4. Engagement with the international local community is significantly related to life satisfaction in the host country.

As populations worldwide continue to age, healthcare for the elderly has become increasingly important. Elderly individuals face unique health challenges and have specific needs that must be addressed at host destinations to ensure their well-being and quality of life, as Hartwell et al. (2016) state in their findings. Preventive care and chronic disease management play critical roles in maintaining their health. Additionally, rehabilitative services and geriatric care specialists are essential to comprehensive care. This demographic also may require home care services to support their independence and comfort. As for the OWB factors, access to healthcare is studied. In this sense, specifically, the affordability of healthcare is a construct that leads to research question 3.

Q3. Is the affordability of healthcare in the destination country related to the life satisfaction of the residential tourists?

Research question 3 leads to hypothesis 5.

H5. The affordability of healthcare in the host destination has a positive correlation with life satisfaction.

According to Asan et al. (2024), Living Conditions are a key OWB factor that affects life satisfaction. For this research, five constructs have been developed to broaden the scope of this key factor. In this case, housing affordability, electricity and water supply, sanitation (sewage and drainage), and safe neighbourhoods were considered categories for study. Then, the research question that arises would be:

Q4. Is there a correlation between living conditions in the host country and life satisfaction?

Based on the research question, the following hypotheses are developed:

H6. Housing affordability in the host destination has a significant relation with life satisfaction.

H7. The evaluation of the electricity supply is significantly related to life satisfaction in the host country.

H8. The evaluation of the water supply service in the host country is significantly related to life satisfaction.

H9. The host country's sewage and drainage (sanitation) evaluation is significantly related to life satisfaction.

H10. The evaluation of public safety in the host country significantly relates to life satisfaction.

Connectedness to nature has been widely acknowledged as having a favourable impact on individuals participating in nature-based activities (Asan et al., 2023). In this sense, environmental quality, as having the conditions for it, is a key factor that intervenes in life satisfaction in host destinations. This research addresses environmental protection, waste management, and access to green spaces (public parks). Thus, the following research question and hypotheses are proposed:

Q5. How does the environmental quality in the host country affect the life satisfaction of the residential tourists?

H11. A significant positive relationship exists between the valuation of environmental protection and life satisfaction in the host country.

H12. The waste management service's valuation correlates with life satisfaction in the host country.

H13. The evaluation of the public parks in the host destination has a significant positive relationship with life satisfaction.

3 Methodology

3.1 Study Settings

The study population consists of international residents in the Chapala area of Mexico. Most are retired North American individuals who spend part of the year at their host destination. The number of North American individuals seeking places to live is increasing as Mexico becomes the top destination in Latin America for American citizens and the second for Canadian tourists worldwide (OIM, 2022). The rapid growth of the international elderly population in Chapala has garnered significant attention over the past few decades (Truly, 2001, 2002, 2006; Sunil et al., 2007; Ceja, 2021; González y Alkin, 2021) due to the social and economic dynamics that this phenomenon brings to the region.

The municipality of Chapala is located in the state of Jalisco on the shore of Lake Chapala, Mexico's largest freshwater body. It has a municipal area of 128 km² (IIEG, 2018), and the total population in 2020 was estimated at 55,196 (INEGI, 2020). The number of residents born in another country was used as the universe to estimate the sample. The population consisted of 5,384 individuals (INEGI, 2020). With a sample of 349 cases, a statistical confidence level of 95% and an estimation error of 5% were achieved according to the finite population formula (Hernández-Sampieri & Mendoza, 2018).

3.2 Measures

The study's constructs were operationalized using multiple-item scales. Each of the factor's constructs was operationalized using a 12-item Likert scale. Four items were adapted from Sunil, Rojas & Bradley (2007) and their work on retirees' motivation to retire in Mexico. The rest of the items were adapted to capture both dimensions of the well-being concept intervening in life satisfaction (Asan et al., 2024). Thus, the SWB involved four items and the OWB involved eight items.

The instrument has three parts. The first collects sociodemographic data, including age, gender, educational level, income, and nationality. The second is dedicated to SWB perceptions, and the third focuses on OWB factors. The instrument consists of six single-response questions and two with sub-questions to facilitate completion and maximize respondents' effective response rate.

Table 2. Items in the survey

Construct	Item description
Subjective Well-being (SWB)	
F1. Expectation vs. Reality (ER)	

ER1	*My living in Chapala matches my expectation*
F2. Social Connections (SC)	
SC1	*I like to be and share with local (native) people*
SC2	*Local (native) people in Chapala area are friendly*
SC3	*I live in Chapala because there is a large international community*
Objective Well-being (OWB)	
F3. Access to Healthcare (AH)	
AH1	*I live in Mexico because healthcare is affordable*
F4. Living Conditions (LC)	
LC1	*I live in Chapala because housing is affordable*
LC2	*Evaluation: electricity*
LC3	*Evaluation: Water supply*
LC4	*Evaluation: Drainage and sewage*
LC5	*Evaluation: Public safety*
F5. Environmental Quality (EQ)	
EQ1	*Evaluation: Environmental protection*
EQ2	*Evaluation: Waste management*
EQ3	*Evaluation: Public parks*
Life Satisfaction (LS)	
LS1	*I'm satisfied with life in Mexico*

Source: Author

All scale items were measured using a 5-point scale. Factors 1, 2, and 3 (F1, F2, F3) and construct 1 of Factor 4 (F4/LC1) were anchored by 1 = Strongly disagree to 5 = Strongly agree. The rest of Factor 4 constructs and Factor 5 (F4, F5) correspond to an evaluation scale anchored by 1 = Very poor to 5 = Very good. Life Satisfaction with life in Mexico was also operationalized using a single item on a Likert scale to test a linear correlation between the items (Table 2).

3.3 Data Collection

The instrument underwent a pilot testing period that allowed for the necessary adjustments. The pilot test involved administering 12 surveys to foreign members of the Lake Chapala Society[2] during December 2023. Furthermore, during the application, wording adjustments were made again for better understanding. The final version is the third version of the questionnaire.

[2] The most numerous association for expatriates in Chapala.

The data was collected over four months, from December 2023 to March 2024, when most international residents are in Mexico. Random sampling and face-to-face interviews were conducted at locations frequented by resident foreigners, such as the American Legion, Lake Chapala Society, Art Forums, and Bicultural Gatherings.[3] A sample size of 348 fulfills the requirement of 95% statistical confidence at the 5% estimated error (Hernández-Sampieri & Mendoza, 2018)

3.4 Data Analysis

For hypothesis testing, inferential statistics allow us to draw conclusions and make decisions based on data analysis. As the quantitative variables to measure are being analyzed to identify the variation in sympathy between them so that corresponding movements in the others accompany movements in one (Sharma, 2005), a correlation analysis is applied to test the hypotheses proposed. The correlation analysis allows for measuring the strength and direction of the relationship between two variables. Even though the correlation measures do not necessarily imply the cause-effect relationship, they measure the strength or degree of the linear relationship between two variables (Sharma, 2005; Benesty et al., 2009). The *p*-value indicates the probability that the observed correlation between the variables occurred by chance, assuming no actual correlation exists in the population and is a crucial metric for determining the significance of the correlation between two variables, helping to infer whether the observed relationship is likely genuine or due to random chance. The significance level of a maximum of 5% (*p*-value 0.05) has been stated as a general parameter accepted in social sciences (Benesty, 2009; Hernández-Sampieri & Mendoza, 2018). Thus, the decision rule would be:

If *p*-value < 0.05, reject the null hypothesis and accept the research hypothesis.

If *p*-value > 0.05, accept the null hypothesis and reject the research hypothesis.

In particular, the Pearson correlation statistical test, a parametric test for linear relationships between continuous variables, was used to identify the relationship between the proposed constructs. It is represented by the Pearson correlation coefficient, denoted as *r,* which ranges from -1 to 1 as follows (Sharma, 2005):

r = 1 indicates a perfect positive linear relationship

r = -1 indicates a perfect negative linear relationship

r = 0 indicates no linear relationship

[3] The international community in the Chapala area heads more than forty associations through which mostly social and cultural events are organized all year long.

According to Hernández-Sampieri & Medoza (2018), the interpretation of the strength of a correlation coefficient can be categorized as follows:

Table 3. Interpretation of the strength of correlations

r	Category	Interpretation
0.01 to 0.19	Very weak correlation	Indicates a very small association between the variables.
0.20 to 0.39	Weak correlation	Suggests a slight relationship between the variables, but it is not strong.
0.40 to 0.59	Moderate correlation	Indicates a noticeable relationship, but not a strong one.
0.60 to 0.79	Strong correlation	Shows a significant relationship between the variables
0.80 to 1.00	Very strong correlation	Suggests a very high association between the variables

Source: Adapted from Hernández-Sampieri & Mendoza, 2018

For the correlation test, the IBM SPSS Statistics software (v. 29.0.2.0) was used for the data management and statistical calculations, including the Pearson correlation coefficient.

4 Results

4.1 Demographics of the participants

According to the results, most respondents are over 58 years old, confirming Chapala as a retiree destination. 80.5% of the sample participated, and most identified themselves as female (76.1%). As for education, most of them have a high education level with 2 or 4 years of college (35.3%), and those who achieved a postgraduate degree (41.9%) (Table 4).

Table 4. Respondents' profile

Age		
	N=348	%
Under 25	5	1.4%
26-40	6	1.7%
41-57	54	15.5%
58-77	193	55.5%
77 +	87	25.0%
Prefer not to answer	3	0.9%
Gender		
	N=348	%

Male	54	15.5%
Female	265	76.1%
Other	12	3.4%
Prefer not to answer	17	4.9%
Educational level		
	N=348	%
0-4 years	8	2.3%
5-8	16	4.6%
9-12	26	7.5%
2 - 4 years of college	123	35.3%
Master's Degree	133	38.2%
PhD	13	3.7%
Prefer not to answer	29	8.3%

Source: author

According to the answers given, the annual income of participants can be observed in three blocks: the first earning less than 51,000 USD (24.7%), a second one with those earning between 51,000 and 79,000 USD (16.1%) and a third one with 80,000 USD to 99,000 USD annual income (50.3%). With this in mind, the major concentration resides in middle-income households in the U.S. parameters (Pew Research Center, 2020) (Table 5).

Table 5. Annual income and nationality

Current income/Year (USD)		
	N=348	%
Under 30,000	26	7.5%
31,000 - 50,000	60	17.2%
51,000 - 79,000	56	16.1%
80,000 - 99,000	116	33.3%
+ 100,000	59	17.0%
Prefer not to answer	31	8.9%
Nationality		
	N=348	%
American	201	57.8%
Canadian	108	31.0%
French	12	3.4%
British	12	3.4%
Other nationality	15	4.3%

Source: Author.

In line with the tourist influx to Mexico, most participants were from the United States, accounting for 57.8%, followed by Canadians at 31.0%. French and British represent only 6.8% of the sample.

4.2 Results of hypotheses testing

SWB Factors

Expectations

As a subjective well-being factor, the attitude towards what is being looked forward to may influence the satisfaction level with life in Mexico. In this sense, the results in the *p*-value are significant (<.001). Thus, the null hypothesis is rejected, and the research hypothesis is accepted, so it can be confirmed that a moderate correlation exists between expectations and life satisfaction in Chapala (r = .574). These results can be interpreted as their expectations before moving to Mexico being met, linked to their satisfaction with life in Mexico.

The implications of these results may lie in the influence of the intermediaries and promoting agencies of retirees to promote Chapala as an idyllic retirement place and the tourist imaginary (Gravari-Barbas & Graburn, 2012; Ceja, 2021).

Table 6. Correlation Factor 1

Correlations		
		I´m satisfied with life in Mexico
My living in Chapala matches my expectations	Pearson Correlation	**.574****
	Sig. (2-tailed)	**<.001**

**** Correlation is significant at the 0.01 level (2-tailed).**

Social Connections

Social connections may improve the sense of belonging and enhance the quality of life (Filep, 2014; Asan et al., 2024). This factor (F2) addressed three operationalized variables to be tested: “I like to be and share with local people” (SC1), “People in Lake Chapala are friendly” (SC2), and “I live in Chapala because there is a large international community” (SC3).

According to the results, all three of them have reached a significance level (*p*-value <.05), so the research hypotheses are supported. Consequently, the following can be assured of a confidence level of 95% and an estimated error of 5%:

1) There is a correlation (r = .160, very weak), a small association between the predisposition to be and share with local people and life satisfaction in Mexico.

2) There is a correlation (r = .180, very weak), a small association between the perception of friendliness of native people and life satisfaction.

3) There is a correlation (r = .280, weak), a slight relationship between moving to Chapala for the large international community and life satisfaction.

In addition to the initial hypotheses proposed, this test identified other expected correlations, such as the relationship between the willingness to engage with the local population and the perception of the latter as friendly people. Thus, a noticeable relationship (r = .461) is identified between perceiving friendliness and a predisposition to spend time with local people (Table 7).

Table 7. Correlation Factor 2

Correlations					
		I´m satisfied with life in Mexico	I like to be and share with local people	People in Lake Chapala area are friendly	I live in Chapala because there is a large internationa l community
I´m satisfied with life in Mexico	Pearson Correlation	1	**.160****	**.180****	**.280****
	Sig. (2-tailed)		**.003**	**<.001**	**<.001**
I like to be and share with local people	Pearson Correlation	.160**	1	**.461****	**.195****
	Sig. (2-tailed)	.003		**<.001**	**<.001**
People in Lake Chapala area are friendly	Pearson Correlation	.180**	.461**	1	**.263****
	Sig. (2-tailed)	<.001	<.001		**<.001**
I live in Chapala because there is a large international community	Pearson Correlation	.280**	.195**	.263**	1
	Sig. (2-tailed)	<.001	<.001	<.001	

**. Correlation is significant at the 0.01 level (2-tailed).

OWB Factors

Access to healthcare

As has been observed, Chapala is primarily a destination for seniors, and it could make healthcare a priority. Elderly people are likely to manage chronic conditions and look for preventive healthcare, which becomes essential and enhances overall quality of life. In this sense, Chapala has seven centers for the care and attention of the elderly focused on this demographic, such as "Nursing Home Lake Chapala" and Happiness *Casa de Cuidados*" (DENUE, 2024). Surprisingly, although there is a significant relationship between life satisfaction and the affordability of healthcare (0.043 < 0.05), the correlation is very weak (r = 0.109), suggesting that this factor may be less influential than the social factor (Table 8).

Table 8. Correlation Factor 3

		I live here because healthcare is affordable
I´m satisfied with life in Mexico	Pearson Correlation	**.109***
	Sig. (2-tailed)	**.043**

***. Correlation is significant at the 0.05 level (2-tailed).**

Living conditions

Factor 4 includes five variables related to housing affordability, public infrastructure, and safety to be tested. According to the results, House Affordability, Electricity and Water Supply are the three variables with positively significant (*p*-value <.05).

Table 9. Correlation Factor 4

Correlations

		I´m satisfied with life in Mexico	I live here because housing is affordable	Electricity	Water supply	Drainage and sewage	Public safety
I´m satisfied with life in Mexico	Pearson Correlation	1	**.111***	**.187****	**.147****	.074	.034
	Sig. (2-tailed)		**.040**	**<.001**	**.006**	.175	.527
I live here because housing is affordable	Pearson Correlation	.111*	1	**.135***	**.136***	**.130***	**.122***
	Sig. (2-tailed)	.040		**.012**	**.011**	**.016**	**.023**
Electricity	Pearson Correlation	.187**	.135*	1	**.813****	**.613****	**.247****
	Sig. (2-tailed)	<.001	.012		**<.001**	**<.001**	**<.001**
Water supply	Pearson Correlation	.147**	.136*	.813**	1	**.678****	**.202****
	Sig. (2-tailed)	.006	.011	<.001		**<.001**	**<.001**
Drainage and sewage	Pearson Correlation	.074	.130*	.613**	.678**	1	**.229****
	Sig. (2-tailed)	.175	.016	<.001	<.001		**<.001**
Public safety	Pearson Correlation	.034	.122*	.247**	.202**	.229**	1
	Sig. (2-tailed)	.527	.023	<.001	<.001	<.001	

***. Correlation is significant at the 0.05 level (2-tailed).**

****. Correlation is significant at the 0.01 level (2-tailed).**

For instance, it can be stated that:

1) There is a correlation (r = .111, very weak) between house affordability and life satisfaction; thus, the research hypothesis is supported.

2) There is a correlation (r = .187, very weak) between the valuation of electricity service and life satisfaction; thus, the research hypothesis is supported.

3) There is a correlation (r = .147, very weak) between the valuation of water supply and life satisfaction; thus, the research hypothesis is supported.

4) There is no significance (p-value > .05) between the variables Drainage & Sewage and Satisfaction with Life in Mexico. Thus, the null hypothesis is accepted.

5) The variables Public Safety and Satisfaction with Life in Mexico are not significantly related (p-value> .05). Thus, the null hypothesis is accepted.

It emphasizes the importance of basic urban services, such as the availability and quality of water and electricity, in the daily lives of retired migrants. In this context, the increasing supply of homes for sale in gated communities is understandable, as these essential services remain accessible despite the frequent absence of running water for many local inhabitants. Similarly, a potential inequity emerges from how urban infrastructure is financed in Mexico, as property taxes are significantly lower than in northern countries, which is identified as one of the key factors to consider when relocating to Mexico (Schafran & Monkkonen, 2011).

Environmental Quality

Environmental quality as an OWB Factor addresses the valorization of public parks, waste management services, and environmental protection (local regulations). The results enable to observe the correlation between these variables, thus allowing us to notice the significant relationship between Environmental Protection and Waste Management (r = .571) and the valuation of Public Parks (r = .306). However, it calls attention to the fact that even though good weather and landscapes are usually mentioned as very important pull factors to a retirement place (Huete & Mantecón, 2017; D'Andrea, 2007, 2016; Kannisto, 2014), none of the proposed variables are significant to life satisfaction in Mexico. According to this information, it can be concluded that:

1) There is no correlation between Environmental Protection in Chapala and Life Satisfaction; thus, the research hypothesis is rejected, and the null hypothesis is accepted.

2) There is no correlation between Waste Management and Life Satisfaction; thus, the research hypothesis is rejected, and the null hypothesis is accepted.

3) There is no correlation between Public Park's valorization and Life Satisfaction; thus, the research hypothesis is rejected, and the null hypothesis is accepted.

Table 10. Correlation Factor 5

Correlations					
		I´m satisfied with life in Mexico	Environmental protection	Waste management	Public parks
I´m satisfied with life in Mexico	Pearson Correlation	1	-.048	-.079	.037
	Sig. (2-tailed)		.373	.145	.496
Environmental protection	Pearson Correlation	-.048	1	**.571****	**.306****
	Sig. (2-tailed)	.373		**<.001**	**<.001**
Waste management	Pearson Correlation	-.079	.571**	1	**.594****
	Sig. (2-tailed)	.145	<.001		**<.001**
Public parks	Pearson Correlation	.037	.306**	.594**	1
	Sig. (2-tailed)	.496	<.001	<.001	

****. Correlation is significant at the 0.01 level (2-tailed).**

The following table summarizes the results of the hypothesis testing.

Table 11. Results of hypothesis testing

Factor	Construct	*p* value	*r*	Results
F1. Expectation (Q1)	Matching expectation (H1)	< .001	.574	Supported
F2. Social connections (Q2)	Local community integration (H2)	.003	.160	Supported
	Friendly local community (H3)	< .001	.180	Supported
	International local community engagement (H4)	< .001	.280	Supported
F3. Access to health services (Q3)	Healthcare affordability (H5)	.043	.109	Supported
F4. Living conditions (Q4)	Housing affordability (H6)	.040	.111	Supported
	Electricity (H7)	< .001	.187	Supported
	Clean water supply (H8)	.006	.147	Supported
	Sanitation (sewage & drainage) (H9)	.175	0.74	Not supported
	Safe neighbourhoods (public safety) (H10)	.527	.034	Not supported

F5. Environmental quality (Q5)	Environmental protection (H11)	.373	-.048	Not supported
	Waste management (H12)	.145	-.079	Not supported
	Access to green spaces (public parks) (H13)	.496	.037	Not supported

Source: Author

5 Conclusions and Implications

Results underscore that social integration—both with local communities and international expatriate groups—plays a more significant role in life satisfaction than even access to affordable healthcare. This challenges the common assumption that practical factors like healthcare are the most critical for retirees. It suggests that fostering meaningful social interactions and community-building initiatives should be a priority for destinations catering to retirees. This aligns with broader psychological research, which consistently shows that social belonging and relationships are fundamental to human happiness.

It is also remarkable how retirees' expectations and tourism imaginaries influence satisfaction. This implies that the way destinations are marketed and perceived—through promotional materials, word-of-mouth, or cultural narratives—can shape retirees' experiences. If expectations are not met, dissatisfaction may arise, even if the destination offers other benefits. This highlights the ethical responsibility of promoters and marketers to present realistic portrayals of life in these locations.

The correlation between affordable housing, reliable utilities, and life satisfaction is a practical reminder that basic needs must be met before higher-level well-being can be achieved. For retirees on fixed incomes, financial security and access to essential services are non-negotiable. This has implications for local governments and real estate developers, who must ensure that housing remains accessible and infrastructure is well-maintained to sustain this demographic.

The finding that environmental factors like weather and landscapes do not significantly correlate with life satisfaction is counterintuitive, given that these are often cited as primary reasons for retiring to places like Chapala. This suggests that while natural beauty and climate may initially attract retirees, they are not sufficient to sustain long-term satisfaction. Instead, social and practical factors take precedence over time. This challenges the tourism and retirement industry to rethink its emphasis on environmental appeal and focus more on creating supportive social and economic ecosystems.

Implications for research

The findings contribute to a more extensive scope of the retiree phenomenon in the Global South, contextualized within larger global trends, including the aging populations of developed countries and escalating living costs. Therefore, it is advisable to formulate new research questions, such as: What are the push factors that affect the decision-making process for relocating to the Global South? Furthermore, as previously mentioned, retirees in Chapala exhibit a higher level of life satisfaction in Mexico, provided their expectations are fulfilled. Consequently, the research questions emerge, including: What role do the promoters of these destinations play in this context? How do the tourism imaginaries exert influence in this regard?

Implications for practice

The findings indicate that this form of migration presents opportunities and challenges for host countries, including Mexico. On the one hand, it has the potential to enhance local economies through sectors such as real estate, healthcare, and tourism. Conversely, if not managed appropriately, it may exacerbate inequalities or excessively burden resources. Furthermore, the results underscore the necessity for a comprehensive strategy to manage retirement destinations, which must encompass social, economic, and infrastructural considerations. Policymakers, businesses, and community leaders should collaborate to create environments that address retirees' diverse needs in balance with the native local population. This encompasses promoting intercultural exchange, providing affordable housing, and ensuring the availability of reliable services, all while considering the potential cultural and economic impacts of significant retirement migration. These insights may contribute to the improved management of second-home destinations for seniors.

Limitations of the study

The validity of the study may depend on the timing of the instrument's application, which could be limited to a period influenced by the social, political, and economic conditions in both the respondents' country of origin and the host country. In case of significant changes, this might lead to a shift in attitudes towards the studied elements. Furthermore, Pearson's correlation analysis serves as an indicator for quantitatively describing the strength and direction of the relationship between two variables and assists in determining its trend. In this context, the proposed research model enables us to explain the correlation between subjective and objective factors and life satisfaction in Mexico among the studied population. These factors have been arbitrarily defined based on the consulted literature, and therefore, the study is limited to them. Including other

elements related to economic, social, political, or emotional factors could open new avenues for exploring well-being and life satisfaction among lifestyle migrants in Mexico.

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