

Second homes in Mexico: An exploration of the social connections of international residents  
in the city of Merida

by

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## **AUTHOR'S DECLARATION**

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners.

I understand that my thesis may be made electronically available to the public.

## ABSTRACT

Owners of second homes construct complex relationships with the people and place they live in especially when the property is located across national borders. While previous research on second homes identified numerous negative impacts associated with the expansion of this phenomenon (Coppock, 1977; Gallent & Twedwr-Jones, 2000; Hall & Müller, 2004), recent studies have turned to examine the social effects of second homes in connection with social capital and the potential contribution that second home owners might bring to the host communities (Gallent, 2014; Huijbens, 2012). This qualitative study explored the social connections of international second home owners in the city of Merida, Mexico placing emphasis on the concept of social capital. Through eleven semi-structured interviews with temporary and permanent residents, the study sought to contribute to our understanding of the second home social experience from the owner's perspective in an international context. Three main themes emerged during the analysis of the data: connecting with others, encountering challenges, and accumulating social capital. Findings revealed that international second home owners were building multiple relationships with local and foreign residents at the second home destination. Additionally, challenges related to communication in Spanish, cultural differences, and tensions among groups of foreigners hindered social interactions and the creation of social ties. Findings also suggested that international second home owners had the potential to accumulate social capital in the city. At an individual level, participants were getting social support and accessing resources through informal social networks. In a collective sense, they were helping the community in voluntary groups and informal projects. Recommendations for both foreign residents and local authorities were also included. Future areas of research include examining the locals' perspective of the presence of second home owners in the city, selecting second home owners from a wide variety of nationalities, and studying the phenomenon in areas with lower density of second homes.

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## **DEDICATION**

“If tears could build a stairway and memories a lane  
I’d walk right up to Heaven and bring you home again”

(Anonymous).

In loving memory of my aunt Liz, my uncle Jorge, and my grandma Leo who left this Earth during my graduate studies journey. You will always live in my heart and in my mind.

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## CHAPTER 1: INTRODUCTION

The study of second homes has attracted scholars from a variety of disciplines including geography, sociology, housing, and tourism studies. In late 1970s, the publication of the book “*Second homes: curse or blessing?*” by John T. Coppock added a significant contribution to second home research aiming to understand the scope of the phenomenon. By that time, second homes were seen as a “problem” that required prompt solutions in relation to policy and planning regulations (Coppock, 1977; Downing & Dower, 1973). Hall and Müller (2004) has argued that second homes gained considerable academic attention during late 80s and 90s possibly due to the growth of interregional and international mobility, increased awareness of the economic, environmental and social implications of tourism, and the reemergence of conflicts between second home development and local residents (p. 4). Some of the topics covered in second home research include: the meaning of home and place attachment (Jaakson, 1986; Kaltenborn, 1997; McIntyre, N., Williams, D., & McHugh, K., 2006; Stedman, 2006), motivations for second home ownership (Chaplin, 1999; Kaltenborn, 1998; Müller, 2002b), the international dimension of second homes (Buller & Hoggart, 1994; Hoogendoorn, Mellett, & Visser, 2005; Müller, 2002), and the impacts associated with the phenomenon (Gallent & Tewdwr-Jones, 2000; Hall & Müller, 2004; Hiltunen, 2007).

One of the major concerns about second home development was the negative effects brought to the host communities. Particularly, environmental, economic, and social impacts were seen to cause tensions and conflicts among residents, particularly in rural areas of England and Wales (Coppock, 1977; Gallent & Tewdwr-Jones, 2000). However, these impacts were viewed as context specific meaning that impacts in other countries and situations could present different

scenarios (Müller & Hoogendoorn, 2013). In addition, perceptions about second homes and their owners could vary in places and contexts. In this sense, Gallent, Mace and Jones (2005) argued that “impacts [of second homes] are subjectively and personally experienced and defined” (p. 38) recognizing that different reactions to this phenomenon are expected to occur.

While some researchers have focused on the negative impacts, others have explored the positive effects of this phenomenon. For instance, Hoogendoorn and Visser (2010) reported that second homes in South Africa played an important role in contributing to the local economy. This was achieved through tourism strategies and specifically second home development in five small towns in the country. In another study undertaken in Norway, Nordbø (2012) found that second home owners showed a *genuine interest* to get involved in the community and assist in the development of the local economy by using their experiences and knowledge.

More recently, there has been a particular interest in exploring the phenomenon of second homes as it can be linked to social capital theory. In this regard, Gallent (2014) suggested that greater integration of, and collaboration with second home owners in their host community, could contribute significantly to social capital generation. Thus, second homes are seen to have an important *social value* in areas where they are located (Gallent, 2014). In other words, second home owners have the potential to benefit local communities and its inhabitants.

Aligned with this view, the present study aimed to investigate the phenomenon of international second homes while considering the social interactions in the community as potential resources for social capital generation. Moreover, as the study was conducted in the city of Merida, Mexico it added to our understanding of second homes in Mexico where the phenomenon has been scarcely studied. An estimation of the number of second homes in 2005, accounted for six hundred thousand properties used as second homes spread across the country

(Hiernaux- Nicolas, 2005). However, more studies need to be done to better understand the phenomenon in different locations and contexts.

### **1.1 Purpose statement and research questions**

The purpose of this study was to explore the social connections of international second home owners in the city of Merida, Mexico in connection with ideas of social capital generation. Merida is the capital city of the state of Yucatan located in southeast Mexico. The research questions guiding this study placed an emphasis on the experiences of second home owners at their host destination and the relationships they established with other residents. The research questions were as follows:

1. How do international second home owners develop social connections in the city?
2. How do they perceive their relationships with the local people and foreign residents?
3. What are some of the difficulties international second home owners face while interacting and connecting with other residents in the city?
4. Are international second home owners enabling the creation of social capital?

### **1.2 Significance of the study**

Second home ownership is a contemporary phenomenon that deserves further exploration and understanding for various reasons. First, research on international second homes can add to our understanding of mobility and transnational lifestyles as they relate to globalization and changes in society (Gustafson, 2001; Paris, 2014). Moreover, the majority of the studies have focused in many parts of Europe and North America paying less attention to the developing world and emerging economies such as the BRIC countries (Brazil, Russia, India, and China). In the case of Mexico, the phenomenon of second homes has been under explored. Many studies have discussed the migration of North American retirees to various locations in the country

without specifically focusing on the ownership of second homes (Dixon, Murray, & Gelatt, 2006; Otero, 1997; Rojas, LeBlanc III, & Sunil, 2014; Stokes, 1990; Truly, 2002). Second, the analysis of urban second homes might bring different insights into the meanings of the phenomenon as most of the studies have been conducted in rural areas (Coppock, 1977; Gallent & Twedwr-Jones, 2000; Hall & Müller, 2004). Particularly in Mexico, there has been greater interest in researching popular beach destinations or small towns that risk ignoring other areas where the presence of second homes is significant such as in large cities (Hiernaux-Nicolas, 2005). Last, second home tourism in the state of Yucatan has been recognized as a growing niche market in the Development State Plan 2012-2018 (Gobierno del Estado de Yucatan, 2013) and therefore, analyzing the phenomenon in the state could serve to help shape local policy and planning strategies. Indeed, hearing the voices of the stakeholders involved could be very enriching and lead to responsive development strategies. It is hoped that this study might serve as a way for the authorities to recognize the value of second homes and take action to mitigate potential impacts associated with its development.

### **1.3 Thesis outline**

The outline of this thesis is as follows: in chapter 2, I examine relevant literature on the second home phenomenon in order to situate the study and identify gaps in our understanding. In chapter 3, I provide a detailed description of the research design and the methods used to collect and analyze data. I also reflect on ethical considerations and my role as researcher. Next, in chapter 4, I present the findings of the study and the interpretation of the participants' responses. In chapter 5, I discuss these findings as they can be linked to academic literature on second homes and other relevant studies. Finally, in chapter 6, I offer closing remarks about the study including a discussion of recommendations, study limitations, and areas for future research.

## CHAPTER 2: LITERATURE REVIEW

This literature review presents an examination of the main topics related to the phenomenon of second homes. In this chapter, five bodies of research are discussed: definition and uses of second homes, motivations for second home ownership, growth in demand for second homes, linking tourism, mobility, and second homes, and impacts of second homes. Additionally, I present an overview of the concept of social capital and consider the contribution it has and can make to second home research. Knowledge gaps and the justification for this study are also highlighted throughout the chapter.

### 2.1 Defining second homes

Many researchers have worked to define second homes and the meaning of second home ownership for various reasons. In early studies situated in England and Wales, rural second homes were defined for statistics and planning purposes. For instance, Bielckus, Rogers, and Wibberley (1972) defined a second home as “a property which is the occasional residence of a household that usually lives elsewhere and which is primarily used for recreation purposes” (p. 9). In a subsequent report by the British Countryside Commission, Downing and Dower (1973) referred to second homes as *built properties* such as houses, cottages, bungalows, chalets, flats or static caravans mainly located in the countryside excluding touring caravans, boats, properties on short tenancies, and properties in major cities and industrial towns (p. 2). The focus was on the recreational use of the property and type of structure. However, if a second home was to be counted, a more explicitly definition was needed to differentiate it from a primary home.

In addition, Pyne (1973) distinguished three categories of holiday properties:

1. *Second home*: a dwelling used by its owner and possibly other visitors for leisure or holiday purposes and which is not the usual or permanent place of residence for the owner;
2. *Holiday investment property*: a dwelling owned either locally or outside the country and not permanently occupied but let to holiday makers solely on a commercial basis;
3. *Club/ institute/ company holiday property*: similar to above but used only by club members or company employees and clients (as cited in Gallent & Twedwr-Jones, 2000, p. 3).

In this definition of second home, the author also focused on the recreational feature but added the frequency of use for vacations or seasonally.

In fact, not every property has always served the purpose of being a second home. Coppock (1977) made a distinction between converted and purposely- built second homes. In case of the former, abandoned properties in rural areas were acquired and adapted for second home-use. On the other hand, brand new properties were constructed to serve as holiday and recreational homes. Moreover, the stages of evolution and adjustments with regards to second home development can vary between country and culture. For example, in countries with cold climates such as Canada, some cottages have gone through the process of *winterization* allowing families to benefit from snow-related activities and other recreational activities during the winter season (Svenson, 2004; Wolfe, 1977). This presented an opportunity to enjoy a second home not only during the summer but also for the winter months.

In another effort to identify second home properties, Coppock (1977) noted that they “do not constitute a discrete type sharply distinguished from other kinds of accommodation” (p. 2). In other words, a second home could not be simply identified by its outside appearance. Accordingly, he suggested considering characteristics such as the changing nature of homes (primary and second), frequency of use (seasonal and permanent), type of structure (mobile and non-mobile), and purpose (recreation, retirement or investment). Therefore, a second home is not

only defined for its physical structure but instead for the function given by its owner. Moreover, Paris (2014) emphasized that second homes could form an essential part of a family life cycle and investment strategies. In this way, for example, a second home property might be used for vacations and be leased or sold for another person's use.

The concept of tenure as it relates to the definition of second homes has also been contested. In Great Britain, the majority of the second homes were owned except for a few cases where the property was leased to others (Downing & Dower, 1973). But while some authors agree that second homes may be owned or rented, some others leave out the leasing condition (Gallent & Tewdwr-Jones, 2000). The ownership criterion is still debatable and dependant on the particular context and purpose.

The lack of an agreed definition has posed several problems in terms of measuring the extent of the second home phenomenon (Coppock, 1977; Downing & Dower, 1973; Gallent & Tewdwr-Jones, 2000). In some European countries, for example, locating and counting second homes represented a difficult task for censuses and statistical data collection because when a property was not considered a second home, it was not included in the surveys (Downing & Dower, 1973). In other cases, owners did not register their properties as second homes to avoid supplementary taxes and empty second homes were not counted if their owners were away during the census (Gallent & Tewdwr-Jones, 2000). Thus, inaccurate and inaccessible data means the total number of second homes is not reflected, thereby hindering the opportunity for regulation and control. In this sense, Gallent, Mace, and Twedwr-Jones (2005) pointed out that gathering the proper information is key for authorities seeking to develop a framework of policies and planning at a local, regional, and national level.

Second homes are also known as vacation homes, cottages, summer homes, cabins or weekend homes (Hall & Müller, 2004). Other terms used by researchers include: ‘second home tourism’ (Jaakson, 1986), ‘alternate home’ (Kaltenborn, 1998), ‘residential tourism’ (Casado-Diaz, 1999), ‘multiple dwelling’ (McIntyre *et al.*, 2006), and ‘multiple homes’ (Paris, 2009). Despite the different terminology, Paris (2009) argued that the term second home should refer to the way a property is used and not to a specific class of accommodation. Also, terminology changes across countries and differs in languages and meanings.

Regarding the location, second homes can be found in different areas principally in the countryside but also in high-amenity areas such as mountain landscapes, around lakes, along the coast, beach resorts, and near cities among others (Casado-Diaz, 1999; Coppock, 1977; Jaakson, 1986; Müller, 2011). Although, research on second homes was initially undertaken domestically, there has been an increasing interest to study second homes in a variety of countries as it is illustrated below.

### ***2.1.1 Transnational second homes***

Ownership of second homes can also have an international dimension. Paris (2011) used the term *transnational second home ownership* to refer to “the ownership of residential property in countries other than the owner’s primary residence” (p. 135). This means that second homes are found across borders supporting many other forms of travel and recreation. The distance from one home to another may vary from short car road trips to long international flights.

Previous research on transnational second homes has been primarily but not exclusively centered in Europe. Examples include studies of British nationals in France (Buller & Hoggart, 1994) and Spain (Casado-Diaz, 1999), German second home owners in Sweden (Müller, 2002a), and Swedish in Spain (Gustafson, 2001). Additional research has taken place in many other

countries such as South Africa (Visser, 2003), New Zealand (Keen, Hall, & Müller, 2004), Mexico (Hiernaux-Nicolas, 2005), Panama (McWatters, 2009), and Malaysia (Wong & Musa, 2015b) which are also regarded as second home destinations by foreign visitors.

Interestingly, the international dimension of second homes in other regions such as the BRIC countries (Brazil, Russia, India, and China) is expected to increase for the upcoming years (Paris, 2014). To illustrate this, a recent study undertaken in Brazil analyzed the stakeholders involved in residential tourism recognizing the enormous potential of the second home development in different areas (Aledo, Loloum, Ortiz, & Garcia-Andreu, 2013). Moreover, some of these countries are not only recipients of transnational second home owners, but are also sending their own citizens to other destinations, as demonstrated in the case of Russian second home owners to Finland (Lipkina, 2013). Given this growth and potential, there is clearly a great need for research focusing on international ownership of second homes. The next sub-section presents an overview of the second home phenomenon in Mexico as an introduction of the study context.

### ***2.1.2 Second homes in Mexico***

The tourism industry in Mexico plays a significant role in the country's economy because of its potential for employment creation and contribution to the gross domestic product (GDP) (Secretaria de Turismo, 2017). Mexico has been ranked 9<sup>th</sup> among the 10 most visited countries by international tourist arrivals accounting for 32.1 million visitors in 2015 (World Tourism Organization, 2016). Earlier scholar studies and government reports in Mexico focused on identifying tourism numbers in hotel accommodations in specific locations. However, in the last 20 years, Mexican authorities have turned to “consider other tourism sectors since international tourism presented in sun and beach destinations has been the most important form of tourism in

the country” (Hiernaux-Nicolas, 2005, p. 2). Besides the mass tourism attractions, other alternatives such as ecotourism, social tourism, and second home tourism have been included in the government research agenda (*ibis.*).

In 2005, a study conducted by the Higher Education Centre of Tourism (an agency of the Ministry of Tourism) defined second homes as “a form of national and international tourism that occupies owned or rented dwelling. Time-shares are excluded for their functioning characteristics” (p. 4). The aim of that study was to evaluate the profile of the *residential tourists* considering a number of different variables. Most of these tourists had a high economic status and were professionals, business men/women, and entrepreneurs. Additionally, the main findings included a description of the most popular second home destinations (Cancun, Acapulco, and Morelos), estimations of the number of second homes in these locations, and expenditures related to second home use. Overall, the main drivers for using second homes in Mexico related to climate or place, vacation and recreation purposes.

Even though second homes do not fit easily within a specific typology, Hiernaux-Nicolas (2005) distinguished two categories of dwelling: single family homes and housing in multi-family units. The former group included houses bought and renovated for second home use, historical buildings converted to second homes, purpose-built second homes, and single family homes in neighbourhoods developed by real state companies. As for the second homes in multi-family units, these are commonly found in complexes with shared facilities and amenities that, in some cases, include secured access to the residence units. However, second homes in regions and communities in Mexico vary considerably making it difficult to categorize second home properties into distinct categories.

Due to discrepancies in official Mexican censuses, the number of dwellings classified as second homes is difficult to estimate (Hiernaux-Nicolas, 2009). A more recent housing survey conducted by the National Institute of Statistics and Geography (INEGI) included the category of second homes among the dwellings counted in 2014. The definition used for second homes in the institution website was as follows: “dwellings different from the principal ones used as temporary residences (for example, used only during vacations, weekends, and temporary works) or those rented, lent, unoccupied or in ruins” (Instituto Nacional de Estadística y Geografía, 2016). Nonetheless, the electronic site did not contain any information related to the current number of second homes in the country.

Thus, more studies of second homes in Mexico are necessary not only to estimate the number of second homes, but also to analyze several topics such as motives for second home ownership, relationships between second home owners and local inhabitants, and the possible impacts associated with this phenomenon.

Indeed, research has shown how second home ownership has been driven by several motivations and individual choices, which vary according to different locations and contexts. These are described in the following section.

## **2.2 Motives for owning second homes**

Ownership of second homes can be for different reasons as well as motivations are shaped by many factors. According to Coppock (1977), the main motivation for purchasing a second home in rural areas was a “desire to escape the pressures of city life” (p. 9). In this way, a second home represented a break from the routine and a space for relaxation. In a study in Norway, Kalterborn (1998) found that the principal motives for using recreation homes were: being in close contact with nature, changing everyday routine, having mind and body rest,

spending time with family, and doing exercise. Also, he added that a second home could strengthen family bonds and promote unity among their members. Depending on the location of the second home, families were able to engage in different recreational activities such as hiking, swimming, hunting, sunbathing, walking, etc.

Additional motivations relate to life cycles and future plans. In this sense, a second home can be purchased for spending family vacations and then years later become a home for retirement (Coppock, 1977). Although a second home may be initially regarded as a retreat for family leisure and recreation, it could be used in the long term as a relocation place when children are grown up. In this case, the second home eventually becomes a primary residence.

In some European countries, second homes are part of a strong family tradition (Gallent & Tewdwr-Jones, 2000). Particularly in Finland and Sweden, second home owners acquire a property so that they could pass it down to the next family member (Jansson & Müller, 2004). Thus, a second home may be inherited to children and grand-children to keep alive family customs and memories of childhood through generations.

Contrary to what is known about the motives of second homes owners in domestic areas, motivation for second home acquisition in other countries could be different. For instance, Elliot (2006) suggested that some of the motivations for international second home ownership include: the search of warmer climates, a retirement place, cheaper living costs, tiredness of the country of residence, a property to rent out, healthy reasons, being closer to family, pursuing a hobby, and starting a business (as cited in Paris, 2011, p. 138). Other reasons may include pursuing a different lifestyle, meeting people, experiencing a new culture, or learning another language. However, these reasons might vary since motivations and expectations changes among individuals and across contexts.

Besides personal motivations and lifestyle choices, second home ownership has also been influenced by a variety of external factors. For instance, the potential to purchase a second home was shaped by social and economic changes taking place after World War II (Gallent & Twedwr-Jones, 2000). These factors are further explained in the next section.

### **2.3 Growth in demand for second homes**

Several factors have contributed to a growing demand for second homes. As Coppock (1977) pointed out, concerns about second home ownership in Europe originated from an increasing number of second homes being purchased in countries like Great Britain and France. However, as Gallent and Twedwr-Jones (2000) argued, this growing demand should be understood within the larger context of a number of socio-economic changes that have affected many parts of the world including increased mobility, advances in technology, available incomes, and demographic changes mainly influenced by globalization (Hall & Williams, 2002). Due to the importance of these topics, I discuss them each below.

#### ***2.3.1 Globalization***

According to Urry (2000), globalization is a series of processes that includes flows of “peoples, images, information, money and waste that move within and especially across national borders” facilitated by advances in transportation and communication systems (p. 35). In this sense, globalization has affected several aspects of society including economy, politics and culture at different levels (Hall, 2005). In particular, these changes have allowed people to engage in different activities such as traveling, purchasing goods and services overseas, and communicating across boundaries through the Internet among others (Urry, 2000).

Indeed, globalization has brought opportunities for more people to travel to other destinations across the globe (Hall & Williams, 2002). Moreover, there has been a greater

interest and ability for purchasing second homes not only domestically but also in different countries around the world (Paris, 2011). As a result, more opportunities to go to different places are possible because of the emergence of new ways of transportation which have been influenced by globalization.

### ***2.3.2 Increased mobility***

Many authors have described mobility as one of the main factors that contributed to a higher demand on second homes (Coppock, 1977; Gallent & Twedwr-Jones, 2000; Hall & Müller, 2004; Halseth, 1998; Mcntyre *et al.* 2006, Paris, 2011). In this context, mobility refers to the movement of people from one place to another and for diverse reasons (Mcntyre *et al.* 2006). Increasing human mobility was facilitated by car ownership which offered the possibility to travel to different destinations including second homes (Coppock, 1977; Hall & Müller, 2004; Paris, 2011). Clearly, having a car facilitated access to second homes in remote places where public transportation was unable to reach.

Besides the automobile, changes in aviation have expanded international travel offering the possibility of reaching longer distances across borders and continents more quickly. In relation to international second homes, traveling to properties in foreign destinations has been enhanced by an increasing number of new routes and low-cost airlines (Paris, 2011). This has presented a great opportunity for second home owners to go to different places at lower prices.

Evolution in transport would not have been possible without the numerous advancements in technology that created innovative and faster ways of travel around the world. As Hall (2005) asserted, transport technology has played a crucial role in facilitating the development of both tourism and second home ownership.

### ***2.3.3 Advances in technology***

Undoubtedly, technology has changed the way people experience the world and interact with others. The emergence of computerized systems, software and micro-electronics has revolutionized communications and networks between individuals and societies allowing a real-time connection across space and time (Urry, 2007). In fact, these innovations have transformed human mobility in relation to both traveling and working. In the one hand, technology has facilitated business and leisure travel through faster means of transportation. On the other, *teleworking* or working from home has been possible thanks to new forms of communication such as mobile phones, computers, and the use of the Internet (Hall & Williams, 2002). This offered potential second home owners with the possibility to acquire a property in increasingly remote or far off destinations without losing the connection with family and friends at the country of residence. Also, performing any type of transaction via the Internet such as banking, tax payments, and paying bills is now doable all while staying at the second home property.

### ***2.3.4 Rising disposable incomes***

The ownership of second homes has been considered a pursuit only available for affluent people (Paris, 2011). As Coppock noted (1977), in ancient societies second homes were exclusively for the wealthier classes. On the post-medieval period, traveling to second homes during the summer season was usually common among members of the high society. Before the industrialization, country houses or *châteaux* in Europe were mainly used by the nobility. Also, in some countries like Canada, second home ownership has been viewed as a status symbol reserved for elite groups (Wolfe, 1977; Jaakson, 1988; Halseth, 1998). This development was echoed in England where primarily affluent people were able to afford properties for second home use in rural areas (Coppock, 1977; Paris, 2011). Contrary to this, Pyne (1973) argued that

after the World War II more members of the middle and lower income groups were able to buy second homes in Wales (as cited in Gallent & Twedwr-Jones, 2000, p. 18). This means that second home ownership was not only possible for the higher classes as previously observed but increasingly available to other groups.

Following this further, continuous economic growth from the 1950s to the 1970s contributed to an improvement of the standards of living in developed nations. This, altogether with salary adjustments in Europe, resulted in increasing disposable incomes that allowed people to set aside capital for leisure and travel. Moreover, changes in pension schemes facilitated an accumulation of capital for retirees translated into more money to use for recreational activities including second homes (Hall & Williams, 2002). Notably, in developing countries, more people were able to acquire second homes as a result of prosperous economic development. For instance, Hoogendoorn and Visser (2015) have argued that second home ownership in South Africa is available for all groups of society including the middle and lower classes.

### ***2.3.5 Demographics and leisure***

Some developed countries have experienced a rapid transformation regarding birth rates and life expectancy. As a result, there has been a significant growth in older populations resulting in greater numbers of people aged 60 and above. Indeed, older adults are likely to live longer and therefore, have more time to spend after retirement. Some of these retirees choose to engage in recreational activities or travel to different destinations to make the most of their leisure time (Hall & Williams, 2002). Moreover, based on their incomes or savings throughout their work life, some older adults may be able to relocate to retirement resorts or purchase second homes in their countries or abroad (Müller, 2002).

In this regard, it is worth mentioning the effect that the *baby boomer* generation has had in different spheres of society and particularly in relation to travel and second homes. The baby boomers are individuals born between 1946 and 1964 and represent the highest rates of births after World War II, which only started to decline in the 1970s (Mankiw & Weil, 1989). Due to their economic status and the availability of leisure time in some developed countries, the so-called “world’s wealthiest generation ever” are becoming potential travelers and second home buyers at domestic and international scales (Coates, Healy, & Morrison, 2002, p. 448). As baby boomers are now approaching retirement, there are more opportunities for second home ownership and migration. For instance, in Switzerland, the baby boomer generation accounts for the highest number of second home owners compared to other groups of people (Bieger, Beritelli, & Weinert, 2007). This illustrates the significant power of acquisition and mobility of this generation.

Along with the description of the main factors that shaped an increasing demand of second home ownership, it is also important to situate the phenomenon of second homes within a discussion of other forms of mobility. The section below focuses on different movements of people in contrast to migration and is followed by two examples of migrants. Then, a discussion of second homes within the larger context of space and time is presented. It is hoped that reviewing these ideas will serve to better understand the background of the study setting and the different forms of mobility and migration that commonly take place in Mexico including seasonal migration and international retirement migration.

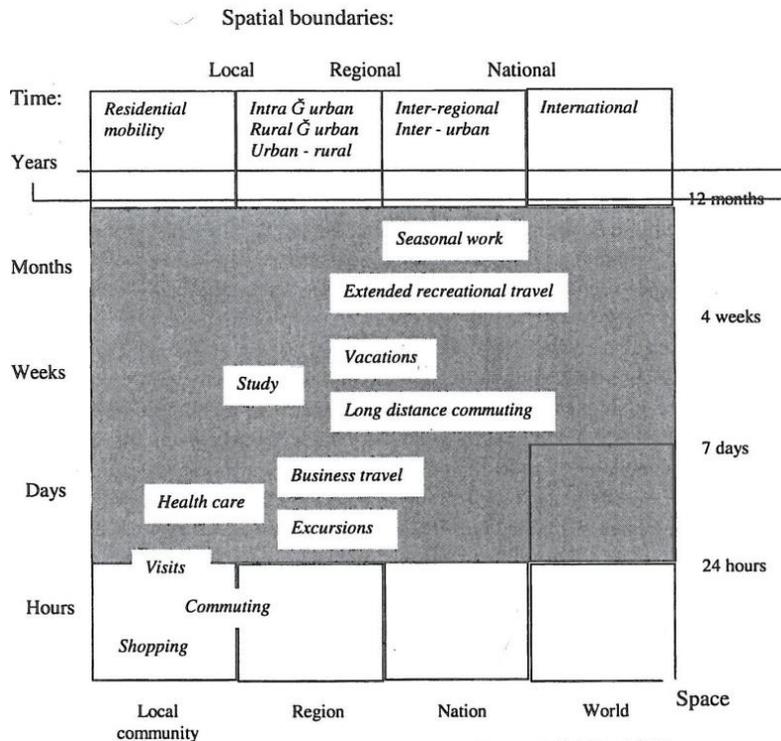
#### **2.4 Linking tourism, mobility, and second homes**

Understandings of the phenomenon of second home ownership have been associated with tourism, mobility, migration, and circulation (Flognfeldt, 2002; Hall, 2005; Jaakson, 1986;

Overvåg, 2011). Many scholars have offered various perspectives to explain the scope of the phenomenon and situate it in space and time. Some of these models have placed second home travel on a continuum which aims to distinguish it from other forms of mobility. For example, and as Overvåg (2011) indicated, second homes presuppose “movement of people from their homes to their second homes” (p. 154). Hence, human mobility is the first consideration when understanding the phenomenon (*ibis.*).

As Hall and Williams (2002) explained there are many forms of people movements ranging in duration (from temporal to permanent) and distance (within the same location and across countries) which are influenced by different purposes. In an effort to explain the difference between tourism and mobility, Bell and Ward (2000) suggested that while “tourism represents one form of circulation, or temporary population movement; [t]emporary movements and permanent migration, in turn, form part of the same continuum of population mobility in time and space” (p. 88). To further clarify this, the authors explained that temporary mobility entails movements for a shorter amount of time whereas permanent migration implies a more definite settlement in a particular destination. In other words, when a person is temporarily going to a place, the stays tend to be brief and continuous. In contrast, permanent migration is long-lasting and stable.

Figure 1 shows different types of *mobilities* in space and time.



Source: Bell and Ward (2000).

In this model, second homes could be placed in the excursions or vacations trips ranging from a few days to several weeks.

Due to the temporal character of human mobility in space and time, accurate numbers of these movements are difficult to obtain (Bell & Ward, 2000). For this reason, defining different forms of travel can be useful to identify and count movements of people across countries. Hall and Williams (2002) proposed a classification that links tourism and migration with different forms of mobility (figure 2). For these authors, there are three types of movements of people: labour migration, consumption migration, and visiting friends and relatives (VFR). The first one involves individuals who settle in a new place looking for job opportunities. Second, the notion of consumption migrants refers to people who might move seasonally (temporary mobility) or permanently (permanent migration) for recreational purposes. Finally, VFR originates from trips of family and/or friends to visit either labour or consumption migrants in a destination. These

three forms of mobility intertwine together and are not fixed in time; instead, they are constantly changing and may even result in a point of return migration. Moreover, some forms of mobility overlap as motivations and goals change over an individual's life influencing their decision for moving to another place (Hall & Williams, 2002). In this sense, people continuously move to other locations and, in some cases, they might move back to their places of previous residence.

Figure 2: Tourism and migration forms.

	Mobility		Age		Property Ownership
	Temporary	Permanent	Younger	Older	
<i>Production-led migration</i>					
Labour	x	x	x		
Entrepreneurial		x	x		x
Return		x	x	x	x
<i>Consumption-led migration</i>					
Economically active		x	x		x
Retirement	x	x		x	x

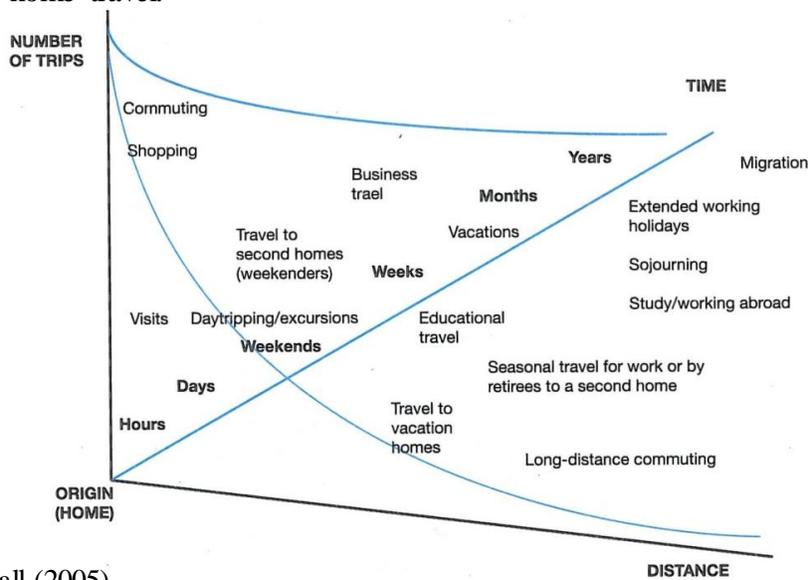
Notes: \* property ownership in the destination

Source: Hall and Williams (2002).

Within the consumption migration form, Hall and Williams (2002) distinguished two groups of potential second home owners. The first group, *economically active migrants* includes current employees with a higher purchasing power because of their earnings. Within this group, the motivation to own a second home may vary from a recreational use to the pursuit of a different lifestyle. Secondly, the *retirement migrants* are older adults who are not dependent on a rigid source of employment and therefore, have the possibility to relocate in other areas. These type of migrants may also purchase a second home in a country different from their usual residence. Moreover, second home ownership in this group could lead to permanent residence (*ibis.*). This means that retired owners who travel temporarily to a destination may become permanent residents by establishing their main home in that place.

According to Hall and Williams (2002), the phenomenon of second homes can be understood as part of the consumption-led migration. In other words, individuals are attracted to “consume” a place for recreation and leisure and not for employment reasons. These temporary movements could range from weekends, weeks, months and also years when there is a possible relocation to a new destination. This could also imply movements at domestic, regional and international scale (*ibis.*). However, a more proper term for referring to the second home phenomenon could be mobility since movements to a second home are usually temporary. The following figure (3) situates travel to second homes within the temporary mobility continuum.

Figure 3: Second home travel.



Source: Hall (2005).

Overall, the phenomenon of second homes is a form of human mobility linked to other types of mobility and migration. This means that it is not an isolated phenomenon but rather overlaps with other movements of people in space and time. In the following sub-section, I discuss two types of migration which are relevant for the overall discussion of international second home ownership and the context of this study.

### ***2.4.1 Second homes and other forms of migration***

As Müller (2002) suggested, “second home ownership can represent almost all forms of the mobility in the spectrum” (p. 174). Hence, second homes could be part of weekend trips, summer vacations, seasonal travel or migration movements. There are two particular types of migration that overlap with the phenomenon of transnational second homes in Mexico: seasonal migration and international retirement migration. Both forms might include ownership of a property at the host destination and so are briefly discussed below.

#### ***2.4.1.1 Seasonal migration***

Krout (1983) explained that seasonal migration involves temporary movements of population that mainly occur during the winter season. *Snowbirds* is the common term used to refer to these seasonal migrants who travel to warmer climates to escape the cold winter months. They spend approximately one to five months in the destination and account for millions of travelers every year (Coates *et al.*, 2002). In the case of North America, some of the popular destinations for Canadian and American snowbirds are the Sunbelt states (Texas, Arizona, California and Florida), Mexico and the Caribbean (Coates *et al.*, 2002; R. King, Warnes, & Williams, 1998). Hence, seasonal migration extends not only to the warmer parts of a country but also to other foreign destinations.

In relation to their accommodation, some snowbirds stay in second homes but also in recreational vehicles (RVs), resorts, or the houses of friends and relatives. Another alternative are residential developments particularly designed for these migrants with access to many facilities, services and recreational activities (Coates *et al.*, 2002). In some areas, there are trailer parks for RVs where large communities of snowbirds gather together to spend the winter months

(Happel & Hogan, 2002). As for second homes, some seasonal migrants spend the winter season at their property and rent it out the rest of the year to other visitors.

#### 2.4.1.2 International retirement migration (IRM)

The phenomenon of international retirement migration (IRM) refers to movements of retired individuals to countries other than their usual residence (Zasada *et al.*, 2010). This type of migration has been long studied in Europe with a particular focus on northern Europeans traveling to southern destinations (King *et al.*, 1998). One of the preferred countries for international retirees in the Mediterranean is Spain. There are large communities of British and Swedish retirees who acquire properties in different destinations along the coast (Casado-Diaz *et al.*, 2004; Gustafson, 2001). Some of these properties are built in residential or *gated communities* which may be specifically created for this purpose. Thus, many retirees gather in sub-communities and are usually surrounded by people of the same nationality.

Similarly, IRM in America includes numerous citizens from the United States who choose destinations in Mexico, Panama, Costa Rica, Dominican Republic, Nicaragua, and Guatemala to spend their retirement years (Rojas *et al.*, 2014). While the principal motivation is the warmer climate, other reasons might include cheaper cost of living, health care, lifestyle changes, and the presence of other foreign residents (*ibis.*). In the case of Mexico, estimations of these retirees are hard to obtain due to divergences in national statistics. For example, nationals of the U.S. visiting Mexico are allowed a maximum of 180 days in the country without a visa (U.S. Department of State, 2017). This suggests that some visitors may be entering the country as tourists but stay longer periods of time at the destination (Lizárraga-Morales, 2009).

Like other forms of mobility and migration, second homes may also bring numerous impacts to the host regions. These are explained next in more detail.

## 2.5 Impacts of second homes

Second homes have been seen as the cause of several negative impacts affecting the host communities and the local population. In England and Wales, Coppock (1977) denounced a public concern of environmental issues and social conflicts that emerged as a result of a growing number of second homes. He called for improved policy and planning in an attempt to minimize some of these negative consequences. Additionally, acquisition of second homes in some areas added pressure on house prices and affordability leading to tensions and displacement of local residents (Gallent & Tewdwr-Jones, 2000; Shucksmith, 1983). The following table illustrates the impacts of second homes reported on a national survey in New Zealand.

Table 1: Impacts of second homes

<b>SOCIAL EFFECTS</b>	<b>PHYSICAL/ ENVIRONMENTAL</b>	<b>ECONOMIC</b>
<i>Positive</i>	<i>Positive</i>	<i>Positive</i>
Enhanced community lifestyle	Beautification of area	Restoration of land values
Input of new ideas into community	Protection of natural areas	Increase in employment opportunities
Creation of facilities	Protection of heritage buildings	Creation of new economic base
Increase in local pride in the area	Wildlife protection	Revitalisation of construction industry
Preserves a traditional way of life	Facilities/ services	Creation of service industries
Use of redundant housing stock		Increase in rates
		Help to maintain existing services
<i>Negative</i>	<i>Negative</i>	<i>Negative</i>
Second home/ local antagonism	Loss of visual amenity	Land values beyond means of locals
Increase in crime	Inadequate waste disposal	Increase in rates
Loss of cultural identity	Environmental degradation	Increase in property prices
Properties empty out of season	Stress on road systems	Increase in cost of local goods and services
Insufficient housing stock	Wildlife deprivation	Increasing cost to local governments
Disruption of rural life	Exploitation of natural areas	
Change in social structure	Poor design construction of houses	
Limits access to recreational areas	Land being taken from conservation areas	
Over crowding	Inadequate water supplies	

Note: Adapted from the original table (as cited in Hall & Müller, 2004, p.28-29).

In the next sub-sections, I review research outlining some of the impacts associated to second home ownership and development. These are divided into environmental, economic and social impacts.

### ***2.5.1 Environmental impacts***

As noted above, Coppock (1977) raised awareness of the potential environmental effects of second homes on landscapes and nature. Mathieson and Wall (1982) identified some negative impacts associated to second homes such as perturbation of wild species and nature for logging and building processes, inappropriate sewage, and even aesthetics (as cited in Hall & Müller, 2004, p. 22). For instance, second home development in Norway has been thought to cause a decline in the destination image affecting the beauty and harmony of the landscape (Hall, Müller, & Saarinen, 2009).

In a discussion of environmental impacts, Downing and Dower (1973) made a distinction between purpose-built second homes and converted second homes. Development of new second homes could bring almost the same damages than the construction of houses or tourist accommodations. On the other hand, renovated second homes could help preserve abandoned buildings. In this way, conversion to second homes might save buildings from being demolished or completely destroyed. Gallent *et al.* (2005) argued that housing development for both primary and second use can lead to real damage to the environment if there is lack of planning and regulation from the local and national authorities.

Second homes may also have positive effects in some communities. To illustrate this, Hiltunen (2007) distinguished three main areas of environmental impacts in Finland: nature, climate, and landscape. The most important positive contribution on nature was enhancement of the human-nature relationship through a closer connection with the environment and use of

recyclable materials for construction and maintenance of second homes. Regarding the effects on climate, using renewable energies at the second homes like solar panels and wood-heating could lead to a reduction on the electric consumption. Last, positive impacts on landscape might take place when second homes contribute to the building's heritage and therefore, enrich the cultural landscape.

### ***2.5.2 Economic impacts***

One of the major problems reported in the 70s was a rise of housing costs due to an increasing growth of second homes in rural areas (Coppock, 1977; Downing & Dower, 1973). In the British context, Shucksmith (1981) noted that a competition among potential buyers was originated in areas where the demand for houses was higher than the actual supply. This situation was aggravated by the salary differences among several social groups. Whereas the richer individuals were able to afford properties, local residents with lower incomes were left at a disadvantage (as cited in Gallent & Tewdwr-Jones, 2000, p. 36). In this sense, urban newcomers could afford properties for second home use in rural areas because of their higher economic position as compared to the local inhabitants. However, Gallent and Tewdwr-Jones (2005) argued that economic impacts on second homes should be evaluated on a case-by-case basis, in particular communities, and in relation to the type of house being renovated or purposely-built. Hence, the rise on housing prices depends on the context and location of the second homes along with the specific characteristics of the property since not every location can have the same effects.

Although the presence of second homes may bring negative consequences, it could also be beneficial for local development (Müller, 2011). Besides the acquisition costs of the property, improvement of second homes might contribute to the local economy (Gallent, Mace, &

Tewdwr-Jones, 2005). For instance, local labour could be employed for the construction and renovations works providing jobs and additional incomes. Moreover, second home owners could help the community to generate economic profits, for example, by supporting tax revenues or purchasing food and services. This could also represent an opportunity to boost the local tourism industry with an increasing demand of service providers such as restaurants, cafes, bars, etc. that could create sources of employment and opportunities for local entrepreneurship (Hall & Müller, 2004).

### ***2.5.3 Social impacts***

Gallent and Tewdwr-Jones (2000) explained that economic impacts sometimes go hand-in-hand with social impacts. In rural Britain, the increasing cost of second homes was thought to cause displacement of the local population (Coppock, 1977; Gallent & Tewdwr-Jones, 2000). Thus, some local inhabitants were not able to afford properties, and therefore had to relocate to other peripheral areas or in cities. In contrast, Marjavaara's work in Sweden (2007) suggested that the supposed local displacement is a myth and is not applicable in all regions. Also, Müller (2004) argued that second home owners may occupy abandoned properties of locals who leave the countryside in search for work opportunities or different lifestyles in urban settings.

Another source of social tension can be the class differences between second home owners and local residents (Coppock, 1977; Jaakson, 1986). As Coppock (1977) noted in England and Wales, the wealthier status of second home owners and their ability to purchase properties created resentment among local residents. In the Canadian context, Jaakson (1986) explained that conflicts of interest tend to worsen the relationships between groups when aspirations and expectations differ. Although the author did not specify the areas covered in the study, Grainger (2005) pointed out the sharp contrast of social classes in the Muskoka region of

central Ontario. Whereas luxury cottages worth millions are reserved for the affluent owners, housing for locals can be in poor and inhospitable conditions. This illustrates the breach between different groups of people and the spaces they use for recreation and living.

However, second homes and their owners can be perceived positively in other places and circumstances. To illustrate this, Flognfeldt (2002) highlighted the image that second home owners had in rural areas of Norway. They were regarded as *local patriots* who are able to bring benefits to the communities by introducing new entrepreneurial and business skills (p. 201). Hence, their contribution had the potential to improve the production and services of local business. Another study undertaken in the city of Charleston in the United States also reflected this perspective (Litvin, Xu, Ferguson, & Smith, 2013). In this study, most of the residents accepted and welcomed second home owners as they showed high interest in being involved in the community; they participated in several activities and were members of local associations and groups. Moreover, some second home owners in that study had created connections among their neighbours and have become part of the community.

As the points above suggested, scholars are beginning to consider the positive side of this phenomenon, specifically in connection with social capital as this concept played a significant role in the present study. An overview of the social capital theory as well as research investigating the positive contribution that second home owners could bring to their host community is presented below.

## **2.6 Social capital**

The concept of social capital has been debated in many spheres of society such as the public opinion, government institutions, and academia (Glover & Hemingway, 2005). Several authors have tried to define and apply social capital in a diversity of contexts and situations over

the last decades (Portes, 1998). In a contemporary sense, Jane Jacobs (1961) was one of the first authors who introduced ideas of social capital (Light, 2004; Woolcock, 1998). However, the term gained greater visibility and recognition with the works of three main theorists: Pierre Bourdieu, James Coleman, and Robert Putnam. Their perspectives on social capital are reviewed below.

The French critical sociologist Pierre Bourdieu made a significant contribution to the understanding of social capital. In his *Theory of Practice*, Bourdieu (1986) identified three concepts: habitus, field and capital. While a discussion to habitus and field are not relevant for this thesis, it is useful to understand how Bourdieu saw capital. For him, there were three main types: economic, cultural, and social. Bourdieu defined social capital as “the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition” (Bourdieu, 1986, p. 248). As Portes (1998) explained, the focus in this definition was on the benefits perceived and the quality of resources obtained by individuals belonging to social groups. Moreover, Bourdieu emphasized that individuals have to work at maintaining their social capital as “social networks are not a natural given and must be constructed through investment strategies oriented to the institutionalization of group relations” (Portes, 1998, p.3). However, Bourdieu’s view of social capital has exposed its negative side in terms of inequality in the production and opportunity to access resources from the social networks created (Carpiano, 2006). Indeed, social capital could be exclusionary meaning that the benefits obtained are available to privileged classes (Gauntlett, 2011). Thus, Bourdieu’s conception of social capital is the most critical since he reinforces power relations and class divisions in society.

In America, the sociologist James Coleman (1988) introduced the concept of social capital in his article called *Social Capital in the Creation of Human Capital*. He brought together sociology and economy with the objective of explaining the usefulness of social capital. For Coleman (1988), social capital “inheres in the structure of relations between actors and among actors. It is not lodged either in the actors themselves or in physical implements of production” (p. S98). Thus, for Coleman, social interactions are essential for the creation of social capital among individuals. He also explained that certain social structures facilitate different forms of social capital for example inside the family or in formal organizations (*ibis.*). Contrary to Bourdieu’s perspective where social capital is available for the dominating classes, Coleman (1988) suggested that resources are available to further more groups including middle and lower classes (Luiz-Coradini, 2010). He also regarded social capital “as the by-product of purposive action intended to achieve other goals” (Glover & Heminway, 2005, p. 391). Hence, social capital can extend to other members of the social network as a consequence of the actors’ pursuit of their own interests.

Finally, the American sociologist Robert Putnam gained public and academic attention for his approach to social capital (Luiz-Coradini, 2010). In the article titled *Bowling Alone*, Putnam (1995) pointed out the apparent drop in civic engagement in contemporary America. According to different surveys, involvement in social groups such as voluntary organizations, boy scouts, or religious groups experienced a considerable decline (*ibis.*). In a later book with the same title, he emphasized this decline in civil engagement and social connectedness. For Putnam (1995), social capital means “features of social organization such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit” (p. 67). In this sense, and as Portes (1998) noted, engagement in groups brings benefits not only to an individual but also to

communities such as villages, cities or also countries. Later, Putnam (2000) distinguished two dimensions of social capital: bonding and bridging capital. The first dimension refers to closer connections like friends, family members, or people from the same social circles. Second, bridging social capital is characterized by diverse social groups from organizations or associations that share a common interest (*ibis*). Thus, bonding capital helps individuals to ‘get by’ and bridging capital supposes collectivity allowing people to ‘get ahead’ in life (Putnam, 2000, p. 23). However, these categories are not exclusive as social capital might exist in both bonding and bridging dimensions at the same time. In essence, the main idea of social capital in Putnam’s civic approach reflects the importance of participating in groups to generate social capital in a collective way.

Even though the conceptualization of social capital differs among Bourdieu, Coleman, and Putman, some similarities can be found in their understandings of social capital. In means of identifying the differences among these perspectives, Woolcock (2003), distinguished two approaches of social capital: the resources and the civic approach (as cited in Glover & Hemingway, 2005, p. 394). This important distinction takes ideas from Bourdieu and Putnam to better understand the divergences in the ways they viewed social capital. In the resources approach, social capital means “access to resources available within social networks, resources that are used in purposive action to establish or maintain individual or group advantages” (Glover & Hemingway, 2005, p. 394). This approach is mainly associated with Bourdieu’s thinking on social capital and the benefits accumulated at an individual level through social ties. The civic approach is then concerned with “the types and extent of individuals in social structures like discussion networks, focusing specifically on their civic content and extrapolating from this to assess the civic health of groups, communities, regions, and entire countries”

(Glover & Hemingway, 2005, p. 395). This approach was initiated by Putnam and considers the collective accumulation of social capital in broader social structures. For the purpose of the present study on international second home ownership, I will follow Woolcock's (2003) distinction of social capital in the resources and civic approaches to discuss the study findings.

Social capital has been applied in numerous studies across disciplines. In his review of the literature, Portes (1998) distinguished three functions of social capital mainly used in scholar studies: as a source of social control, as a source of family support, and as a source of benefits through extra familial networks (p. 9). However, the last function has received more academic attention. (*ibis.*). To illustrate this, I will provide two examples of research highlighting the benefits obtained by virtue of external social networks. In leisure research, Glover, Parry, and Shnew (2005) stressed the significant role of leisure in the creation of social capital. In their study of community garden groups, they found that *leisure episodes* understood as “moments during which the participants open themselves up to the possibility of relationship building” (p. 468) gave gardeners the opportunity of building social ties. These ties were an initial step for the accumulation of social capital. As a result, connecting with others enabled access to resources important for the community gardens. In a study of international retirement migration, Casado-Diaz (2009) applied Putnam's civic approach to analyze the social contacts of British retirees living in Spain. While *bonding capital* was used to identify relationships with friends and relatives from the UK as well as with other British retirees living in the region of Costa Blanca; *bridging social capital* referred to the connections with local Spanish residents and nationals from other countries. The findings showed that bonding social capital was stronger among British retirees meaning that they spent more time among compatriots in comparison to Spanish inhabitants and other foreign residents. Besides these two studies using a social capital analysis,

a new trend in second home research has included various perspectives of social capital to examine the ownership of second homes. This is expanded in the following sub-section.

### ***2.6.1 Social capital and second home ownership***

Applying the notion of social capital to the second home phenomenon has been a matter of recent research interest. Building on ideas of dwelling (Heidegger, 1971; P. King 1960-, 2004) and social capital accumulation (Agnitsch, Flora, & Ryan, 2006; Putnam, 2000), Gallent (2014) proposed a framework to reconsider the phenomenon of second homes and the social effects associated with its development. He argued that second homes could present “a potential source of bridging social capital” when temporary and permanent residents connect to social networks and introduce new capabilities in rural communities (p. 183). It is in this social exchange that a community could be “transformed, reinvented and potentially reinvigorated” (Gallent, 2014, p. 179). In this sense, second home owners have the ability to bring benefits to communities by transferring knowledge and skills, and therefore, contributing to social capital generation.

Only few studies have included ideas of social capital in the context of second home ownership. For instance, Huijbens (2012) examined the role of second home owners and their possible contribution to the maintenance of the social fabric in two small villages in Iceland. Drawing on Johannesson, Skaptadottir, and Benediktsson’s (2005) understanding of social capital as “embedded in the relations between individuals, who take part in various social networks in their daily lives” (as cited in Huijbens, 2012, p.337), he sought to establish how informal social networking and participation in the community could help to sustain the production of social capital. In this study, the author distinguished two groups of second home owners being the “lifestyle locals” who presented a higher degree of local involvement and participation in the community. These second home owners have created relationships and

shared their expertise with the local people as well as promoted the place as a tourism destination.

In another study, Gallent (2015) explored the potential of second home owners for introducing bridging social capital in the island of Sardinia, Italy. Based on his previous framework for considering the social value of second homes in rural communities (Gallent, 2014), the study examined the types of networks built in the community and the extent to which second home owners transferred ideas, knowledge, and skills through external social networks. He found that although second home owners had the skills, they were not benefiting the community in a very significant way. Also, most of the social ties built in the community were amongst family members and friends rather than other residents living in the area. Consequently, there was not a representative bridging social capital generated by second home owners in the island. The author concluded that social capital generation depends on the type of community and entails a complex series of factors, including seasonality, family connections, or place attachment which could influence a person to get involved, or not, in a community.

## **2.7 Conclusion**

This chapter reviewed past and current literature of the second home phenomenon from an international perspective. The first section explored the terminology and uses of second homes as well as the transnational dimension of second home ownership. Secondly, motivations for acquiring second homes were discussed being recreation and leisure, investment, retirement strategies, and family heritage among the principal ones. Next, some of the main socio-economic changes shaping society were explained to show the impact on the growing demand for second homes across countries. Then, the discussion of travel to second homes was situated within the broader context of space and time to better understand the overlap with tourism, mobility, and

other forms of migration and its connection to second home ownership in Mexico. Moreover, research related to assessing the environmental, economic, and social impacts of second home ownership was described along with examples of negative and positive consequences. Finally, the concept of social capital was briefly discussed and in terms of how it can be aligned with research on second homes to further situate the intended study. Moreover, this review addressed numerous gaps in literature related to the need to conduct research on the transnational dimension of second homes linked to social capital theory. In the following chapter, I present the methodology and methods used in order to meet the purpose of this study.

## CHAPTER 3: RESEARCH DESIGN

The present study was designed to explore the social connections of international second home owners in the city of Merida, Mexico. By using a qualitative case study, this research aimed to have a better understanding of the participants' experiences at the second home destination. A particular emphasis was given to the ways social capital might be generated by participants. The following four questions guided this study:

1. How do international second home owners develop social connections in the city?
2. How do they perceive their relationships with the local people and foreign residents?
3. What are some of the difficulties international second home owners face while interacting and connecting with other residents in the city?
4. Are international second home owners enabling the creation of social capital?

This chapter provides details about the research approach adopted for this study as well as a description of the study site and context. In addition, the strategies for recruiting participants as well as the methods for gathering information are explained to illustrate the data collection process. Then, the steps for the analysis and coding of data are described. Last, issues of ethics and reflexivity are considered.

### **3.1 Qualitative approach**

Qualitative research is an “approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem” (Creswell, 2014, p .4). In this sense, the use of a qualitative approach allows an in-depth knowledge of everyday situations, social issues, and experiences from the people's point of view. Contrary to a quantitative approach that focus more on the ‘quantities’ and measures of a large population, a qualitative study emphasizes

the ‘qualities’ as well as processes and meanings of the social experience. Thus, a qualitative approach calls for interpretation about a phenomenon from the participant’s perspective in his or her natural setting (Denzin & Lincoln, 2005). Moreover, qualitative research relates to the “personal, face-to-face, and immediate” (Janesick, 2013, p. 57). This means that a qualitative researcher gets closer to the participants in order to gather stories, accounts, and lived experiences of their realities.

For the purpose of this study and the research questions, I selected a qualitative approach. My interest for the topic of second homes combined with my curiosity to learn led me to undertake this research study for a better understanding of the phenomenon from an international perspective. In this way, a qualitative approach gave me the opportunity to have a closer contact with the study participants and to hear their experience at the second home destination as well as the relationships they have created with others. I also wanted to explore the challenges they were facing in terms of social interactions and relationship building. Lastly, I wanted to know if participants were generating or not social capital in the city. Within these ideas in mind, I followed a qualitative approach that allowed me to be more flexible, reflective, and creative throughout the research project.

### **3.2 Case study**

Case studies have been long used in various disciplines including the social sciences. However, differing perspectives exist on the meanings and uses of case studies (Gerring, 2004). The literature shows an extensive debate about the topic with an emergence of a number of definitions and typologies presented by several authors (George & Bennett, 2005; Gerring, 2004; Simons, 2009; Stake, 1995; Thomas, 2011; Yin, 2009).

One of the primary considerations is to define what a case is. Stake (2003) suggested that a case is “specific, unique, and bounded system” (p. 136). Thus, particularity and boundedness are characteristics to better specify a case. In another effort, Gerring (2007) explained that “case connotes a spatially delimited phenomenon (a unit) observed at a single point in time or over some period of time. It comprises the type of phenomenon that an inference attempts to explain” (p. 19). In other words, a case is individual and bounded in time aiming to understand a particular phenomenon.

In describing case studies, many authors have proposed different definitions. Yin (2009) defined case study as “an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident” (p. 13). Although Yin seems to disagree with the notion of *boundedness* offered by Stake (2003), it adds the element of a research conducted in a natural setting. In another definition, Simons (2009) described case study as “an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, program or system in a “real life” context” (p. 21). Similar to Yin (2009), an emphasis is placed on the real situations of the case being studied. According to these authors, case study research involves observing and exploring a phenomenon in the place where it occurs and considering different points of view.

In relation to the typology, Stake (2003) identified three categories of case studies: intrinsic, instrumental and comparative. An intrinsic case study aims to understand the case itself. Secondly, an instrumental case is used “to provide insight into an issue or to redraw a generalization” (p. 137). In other words, the case has a “supportive role” aiming to gain an understanding of another interest. Finally, a collective case study investigates several cases to

obtain insights about a phenomenon, population or general condition (p. 138). Regarding this study, an *instrumental* case study might serve to advance our understanding of the phenomenon of second homes in the city of Merida. However, the objective is not to generalize but rather to learn from the similarities and differences of the particular case in comparison to others.

Besides the different classifications of case studies, Thomas (2011) suggested that case study research should include two elements:

1. A “practical, historical unity” or the *subject* of the study.
2. An analytical or theoretical frame referred to as *object* of the study (p. 513).

Within this perspective, the subject is an occurrence of a phenomenon and the object is “the analytical framework within the case is viewed and which the case exemplifies” (p. 515). Also, Thomas (2011) emphasized the importance of distinguishing subject and object in conducting case studies in the social sciences. In positioning my study within this perspective, I identify the subject as the city of Merida and the object as the social connections of transnational second home owners.

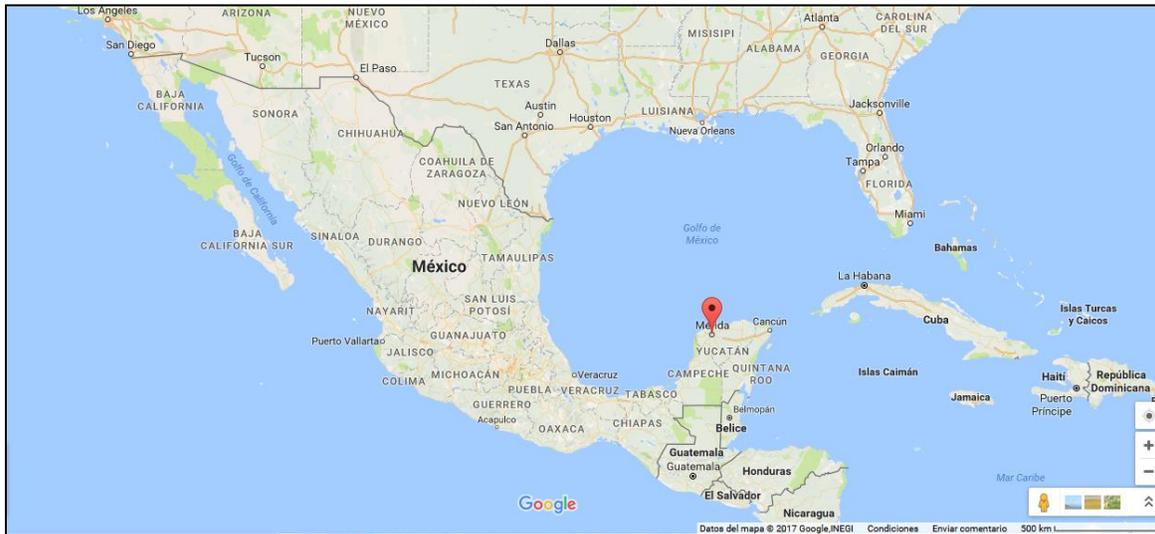
Given the exploratory nature of this research, a case study design frame fit the purpose and the research questions. In this way, following a case study methodology facilitated the study of the phenomenon of second homes aiming to provide insights of the relationships happening in the city of Merida and the possible generation of social capital.

### **3.3 Study site**

Merida is the largest city and capital of the state of Yucatan in Mexico. The city is located in the northwest part of the State less than 40 km from the Gulf of Mexico (figure 4). The State has a very flat topography a few meters above the sea level. The average temperature is of 26.31 degrees Celsius being the warmest season from April and August with temperatures up to

40°C. The language predominantly spoken is Spanish and in some rural communities the Mayan language is still spoken (Dirección de Turismo y Promoción Económica, n.d.).

Figure 4: Location of Mérida



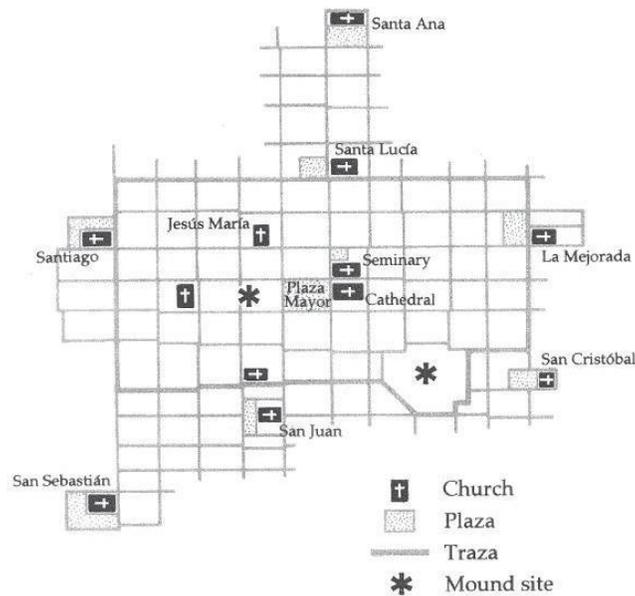
Source: Google Maps (2017).

The city was founded in 1542 by the Spanish conqueror Francisco de Montejo “el Mozo”. When the Spanish arrived, they found the remains of an ancient Mayan city known as *Ichcaanzihó* which in Mayan means “five hills”. The city was then given the name of Merida because of the similarities the conquerors found on the constructions compared to the roman ruins of the Spanish Merida situated in Extremadura (Archivo Histórico del Municipio de Mérida Yucatán, n.d.).

The urban development of the city after the Spanish conquest followed a quadrangular scheme with parallel streets and blocks resembling a chess board. Some of the stones of the ancient pyramids were used to build the cathedral and other important buildings around the main square. The city was laid out facing the four cardinal points and divided into four sections with *barrios* or neighbourhoods. To the north was *San Sebastián*, to the west *Santiago* and *Santa*

*Catarina*, to the east *San Cristobal*, and to the north *Santa Lucía* and *Santa Ana* (figure 5). Each *barrio* was devoted to a patron saint as the Spanish conquerors introduced the Catholic religion and beliefs to the new place. The center of the city was then reserved for the Spanish and their families while the new *barrios* were for the indigenous inhabitants (México desconocido, 2017).

Figure 5: Spatial distribution of Merida after 1686



Source: Restall (2009, p. 17).

According to the last census in 2015, Merida has a population of 892 363 inhabitants (INEGI, 2015). The tourism industry in the city has a significant economic, political, and cultural value. The Mayan heritage and local traditions are unique and continue to be alive in the cuisine, language, music, and numerous festivities. Twice named the American Capital of Culture in 2000 and 2017, the city has a vast tourism infrastructure with more than 5 thousand 919 rooms in hotels from different categories, venues for congress and conventions, more than 300 restaurants, and a great offer of cultural and touristic attractions year round (SEFOTUR, 2017).

### **3.3.1 Second homes in Yucatan**

The study of second homes in the state of Yucatan is limited. The phenomenon has been considered a form of coastal tourism together with day trips and short stays in hotels (Garcia de Fuentes & Koh, 2007). Travel to second homes appeared as a domestic type of tourism performed by the local people from Merida and nearby locations who travelled to their beach homes to spend weekends, summers, and other holidays. In mid 90s, foreign retirees mainly from the United States and Canada began to purchase properties along the coastline principally to spend the winter months. The arrival of these retirees demanded new services such as transportation, food, and medical services which in some cases were relatively cheaper than their countries of residency (García de Fuentes, Koh, Ávila, Gil, & Montejano, 2011). In fact, the construction of properties for local or foreign tourists continues to expand along the coast (*ibis.*). These include condominiums, apartment buildings, and new projects like the Flamingo Lakes Resort and the Yucatán Country Club. However, the phenomenon of second homes in other areas besides the coast has not been explored. This research study sought to help address this gap by focusing on second homes located in the city of Merida.

### **3.4 Data collection**

Data were collected in Merida over a five week period in spring 2016 principally through qualitative interviews. As Creswell (2014) explained, qualitative interviews are used to gather opinions and views from the research subjects about a particular topic. Choosing this method for data collection allowed me to explore the experiences of second home ownership from the owner's perspective. The following sub-sections further detail the process of recruiting participants, conducting semi-structured interviews, and using a reflective journal to keep record of the data collected in the field.

### ***3.4.1 Selection of participants***

The process of recruiting participants initially took place in a not-for-profit organization called *the Bookshelf* (the name has been changed for reasons of confidentiality). This organization runs a variety of programs and activities for the English speaking community in the city of Merida, Yucatan. The idea of contacting this specific place came from a previous experience I had attending one of their activities. Knowing that many foreigners gather there led me to consider this organization as a potential recruitment place for participants to my study.

Once I received ethics clearance from the Office of Research Ethics, I contacted the organization via e-mail explaining the purpose of the study along with the invitation letter as an attachment file (appendix 1). I also expressed the reasons for choosing the place and provided my contact details if they were interested to take part in the study. A few days later, I received a reply from Samantha (pseudonym used) expressing interest about the project. As the *gatekeeper*, she helped me to establish contact with Board of Directors and seek approval to undertake the study at the organization. Then, I scheduled an interview with her to further explain the conditions of participation and selection of candidates. The organization was not involved in the recruitment of participants but instead, it was me who talked to the people and invited them to be part of the research project. Finally, I received written consent of the Board of Directors to go ahead with the research project.

Selecting participants for this study occurred in a variety of ways. First, I started going to *the Bookshelf* at different times to find potential candidates. At mornings, I used to go during the site opening hours where people usually go to borrow or return books, meet other people or request information. Additionally, I attended the weekly language exchange program to be able to reach more participants for the study. The initial strategy I used for recruitment was

*purposeful sampling* in which a researcher selects individuals “because they can purposely inform an understanding of the research problem and central phenomenon of the study” (Creswell, 2007, p. 125). What I did was to informally speak to people to determine whether they were eligible to be part of the study or not. Once I had identified a potential participant, I explained the purpose of the study and the conditions to participate using my recruitment speech (appendix 2). If a person expressed interest to participate, I handed them the invitation letter to read and ask any questions (appendix 3). Then, I requested their contact details to schedule an interview. Although I thought this strategy would be very useful, it only helped me to recruit a few participants.

The second strategy and the one that proved to be more effective was *snowball sampling*. This sampling technique served to recruit more participants “through referrals made among people who share or know of others who possess some characteristics that are of research interest” (Birnacki & Waldorf, 1981, p. 141). One of the couples that I first interviewed kindly offered to help me by giving my business card to their friends and acquaintances. After a few days, I received an e-mail from a couple interested in my study. Then, another couple and so on. I quickly sent them a reply to expand information about the study and ask a suitable time for an interview. Additionally, another participant that I had previously interviewed, offered help to find more participants. After talking to her acquaintances, she continued sending me other people’s contact details so that I can further explain the purpose of the study and confirm their participation in an interview if they were willing to be involved. In this way, participants’ social networks proved to be highly helpful throughout the recruitment process.

Defining the criteria for recruiting participants was difficult and problematic during both the research design and the data collection processes. Labeling a participant solely as an

international second home owner excluded the multiple dimensions of mobility that second homes represents in the continuum. As previously noted in literature, owning a second home in some cases could lead to permanent migration (Hall & Williams, 2002). In means of identifying the participants of the study, I decided to distinguish two groups: temporary and permanent residents. In this sense, I used the term temporary residents to refer to individuals who lived in the city for less than six months including seasonal visitors or *snowbirds*. Permanent residents were those individuals who stayed more than 6 months or lived permanently in the city. They might perform occasional trips back and forth to their countries.

Finally, the criteria I used to select participants included: nationals of foreign countries who owned or rented a property for recreation, vacations, or retirement in Merida. Both male and female adults were welcomed to participate. Employed, unemployed and retirees were also considered in the study excluding students, individuals who relocated for employment opportunities, or spouses/ partners of Mexican residents who immigrated to the country for reasons of family reunification. Preferred languages included English and Spanish since translation from other languages was not considered.

### ***3.4.2 Semi-structured interviews***

As for the type of interviews used for collecting data, I adopted a semi-structured style. In semi-structured interviewing, the use of open-ended questions seeks to elicit meaningful responses (Patton, 1990) . Accordingly, open-ended questions allow participants to freely express their opinions about the social world (Bryman, Teevan, & Bell, 2009). In this way, following a semi-structured guide gave me the opportunity to be more flexible when asking and adapting questions during the interviews. Moreover, I was able to discuss with participants in a conversational and dynamic manner permitting the “flow of the interview” (Robson, 2011, p.

280). Additionally, I had the ability to probe and ask additional questions of the participants' experiences. The general topics discussed in the interviews included motivations for living in Merida, relationships with locals and foreigners, difficulties for interacting with others, and engagement in the community. I also considered questions related to the potential accumulation of social capital by participants.

For this study, I conducted 11 semi-structured interviews beginning on the last week of March until the third week of April 2016. While scheduling interviews, I asked participants their preferred location and availability to meet. As for the setting, I interviewed participants individually or in couples at their homes, restaurants or cafes, or the recruitment site *the Bookshelf*. When I arrived to the location, I introduced myself and started a quick conversation to establish rapport and create a relaxed environment. Then, I explained again the purpose of the research and gave time for questions. I also handed in the consent form to read and sign (appendix 4). In the meantime, I prepared the audio recorder and my notebook. Before I started recording, I asked participants to provide certain demographic data (table 2). For interviewing, I used a semi-structured guide (appendix 5) to lead me through the questions and keep control of the topics I wanted to touch upon. At the same time, I was taking notes of things that caught my attention or words that required further explanation and probed when I considered participants could expand more on a particular subject. In some cases, the conversation went a bit out of focus, so I tried to return to the topic by following the interview guide. Overall, the interview processes went smoothly with participants being open for sharing their time and giving details about their life experience in Merida. The average time for all the interviews was between 30 to 110 minutes.

Table 2: Demographic data of the study participants

	Name (Pseudo)	Nationality	Age	Sex	Educational level	Occupation	Marital status	Type of resident
1	Nick	Canadian	77	M	Undergraduate	Retired	Married	Temporary
	Helen	Canadian	75	F	Graduate	Retired	Married	Temporary
2	Irene	British (Australian)	73	F	Not finished undergraduate	Retired/ Employed	Single	Permanent
3	Natalie	American	67	F	Undergraduate	Retired	Single	Permanent
4	Mike	Canadian	67	M	Undergraduate	Retired	Married	Temporary
	Emma	Canadian	67	F	Undergraduate	Retired	Married	Temporary
5	Eleanor	American	72	F	Graduate	Retired	Divorced	Permanent
6	Hailey	British (Mexican)	70	F	Undergraduate	Retired/ Employed	Divorced	Permanent
7	Patrick	American	69	M	Graduate	Retired	Married	Temporary
	Allison	American	74	F	Undergraduate	Retired	Married	Temporary
8	Alex	Canadian	48	M	Undergraduate	Retired	Married	Permanent
	Olivier	French	57	M	College	Retired	Married	Permanent
9	Rachel	American	68	F	Graduate	Retired	Divorced	Permanent
10	Clementine	Canadian	62	F	Graduate	Retired	Married	Temporary
11	Frank	Canadian	65	M	Graduate	Retired	Married	Temporary

The basic profile information of the participants is represented in the table above. The majority came from North America and Europe ranging in age from 48 to 77 years old. Almost all of them had a university/ college degree and were retired from their home countries except for two women who were working in Merida. The length of time spent in the city varied considerably among participants. While some of them stayed 3 or 5 weeks out of the year in Merida, others have been living in the city for more than 10 years. It is important to note that some of the permanent residents began as temporary residents performing trips back and forth to their countries. They bought a second home for holiday purposes which has become their primary residency. In other cases, some temporary residents admitted that they would consider retiring in the city. As for the tenure, the majority of participants owned their homes with the exception of 3 women. Most of the houses were located in the *barrio* known as *Santiago* or nearby areas (figure 6). Only 2 women lived in other neighbourhoods outside of the city centre. Some participants admitted that living in *centro* was very convenient since they could walk

everywhere and find places to eat or shop. In many cases, renovations and construction works were performed in their homes by real state companies or local employees. Actually, many of these houses have been converted from old or deteriorated properties meaning that they were not purposely-built for recreation or holiday use.

Figure 6: Street in the neighbourhood of *Santiago*.



Note: Picture taken by author (2015).

### ***3.4.3 Personal journal***

Keeping a personal journal helped me to reflect on my ideas, thoughts, and insights throughout the research process. This was a very important tool since it enabled me to better organize my thoughts and find different ways to express myself on paper. Before starting my fieldwork, I wrote about the expectations, concerns, and doubts I had upon arrival to Merida. Even though I did not write every day, I usually kept track of my impressions after the interviews, comments about the study participants, or whenever I felt the need to express something. I also recorded my frustrations and disappointments in the field and after my return to Canada. Indeed, my personal journal played a key role during the writing process of my whole thesis. It helped me to complete ideas and add information on the chapters I was working on

particularly to the research design, findings, and discussion chapters. I referred back to it anytime I needed to remember something or include clarifying information of the participants and the research project. Because I was keeping record of my thoughts, I was able to reflect on my role as a researcher as well as the meanings and interpretations I was giving to the participants' experiences on second home ownership.

Figure 7: Personal journal example

11.04.16

Participant's criterion is getting very confusing. Even if I have already defined who the participants are (the ones I need) I'm facing some kind of difficulties... I think my recruitment hasn't been as effective as I wanted it to be. I know some people have tried to help me referring me to their friends but in some cases these friends do not meet the criteria...I need to be more selective with my participants!

### 3.5 Data analysis

The data analysis process occurred in two major stages: an informal analysis of the data and coding following Charmaz's (2006) guidance on developing grounded theory. I began to informally analyze the data back in Mexico. As I was interviewing participants, I started to note connections and similarities on the information I was hearing. I was also adapting the questions and making the necessary changes to focus on the data I wanted to obtain. While on field, I recorded my thoughts on my personal journal as well as my procedural memo to keep track of this early analysis and reflect on the actual experience of interviewing. The next step was getting closer to the data to obtain a general sense of the information. Once I concluded the 11 interviews, I proceeded with transcribing. Even though I initially planned to conduct the

interviews and transcribe simultaneously, I was not able to work on the transcriptions due to lack of time on the field. When I returned to Canada, I started to transcribe entire interviews into word documents myself. I used a website application (<http://otranscribe.com/>) for audio transcription that helped to reduce the transcribing time. With this program, I could slow down or stop the audio recording so that I could type in at my own pace. At the same time, I was writing on my notebook ideas and thoughts from what I was hearing in the interviews. My intention was to capture comments and opinions that stood out and parts of the conversations that caught my attention. Then, I reread the transcripts to correct any mistakes and translated the words I was not familiarized with. Since all interviews were conducted in English, it was very important for me to understand meanings of words and expressions as a non-native English speaker. I also listened to the audio recordings a few more times to pay attention into accents, voice tones, and emphasis in situations. Lastly, I organized and prepared the transcripts in single files for coding.

### **3.5.1 Coding**

The next stage in the analysis process was to code the data. Coding consists in assigning short labels to data segments for interpretation and categorization (Charmaz, 2006). Through coding, a researcher starts interpreting what the data is about. For the formal data analysis, I used Charmaz's (2006) grounded theory coding. As a first-time researcher, I chose this type of coding so that I could follow a clear set of guidelines to analyze the data and form themes that later served to represent the findings. In grounded theory, there are two main types of coding: initial and focused coding. The former consists of assigning codes to every word, line or segment in a quick manner so that these initial codes can be later refined. Secondly, focused coding is used for identifying and creating categories for larger segments of data (*ibis.*)

Regarding the initial coding, I developed codes line-by-line for each of the interviews. I used the comments option in Microsoft Word to assign codes to every line of the text. Following Charmaz's (2006) advice, I used action verbs to refer to the data rather than concepts. Using gerunds provides codes with a stronger sense of action and sequence (*ibis.*). This type of coding helped me to discover hidden pieces of information that I missed out during previous readings of the transcripts. I also highlighted phrases and statements that I considered important for future reference. In particular, I began to discover information that I was not expecting to hear, for example, negative comments, bad experiences or disagreements with others. As I was coding the data, I noted more connections across interviews and found similarities in participants' opinions.

Then, I continued with focused coding. I copied entire paragraphs that contained data of interactions, relationships, connections, friendships or any other social-related information into new Word documents. I assigned codes to paragraphs or segments of data using again the comments function at the right side of the page. Next, I wrote all focused codes in a new Excel worksheet organized by interview number. This helped me to have a better picture of all the codes that emerged in every interview as well as to identify the ones that resonated across interviews. Through constant comparison of codes to codes and codes with data, I began to see more connections and links in the data.

The last step in the process was to develop focused codes into categories and sub-categories. Axial coding is a strategy used to link categories and make relationships among the data based on formal procedures (Charmaz, 2006). Although I initially considered using this strategy, I preferred to follow a more flexible way to create categories through an informal process that worked better for me. First, I wrote the focused codes in sheets of paper, cut them, and grouped them into categories. I repeated the process several times until I considered the

codes were best aligned with their categories. Then, I listed the categories and subcategories as well as I created a conceptual map on paper to show the connections among them. Finally, I created a new Excel file with the list of categories and subcategories. I merged categories, modified some and renamed others to refine the existed ones into themes. These categories were constantly evolving throughout the analysis and representation of findings.

Additionally, writing memos was very useful during the analysis of the data and organization of themes. Charmaz (2006) explained that memo-writing is an essential step that helps a researcher to develop ideas, thoughts and insights about the data collected. Moreover, memos serve to make comparisons and connections between codes, data, categories, and concepts. Through memo-writing, I was able to explore relationships among the data, but more specifically to discover ideas about the focused codes I already had. My intention was to see what was happening in the data and what the participants were expressing. To illustrate this process, I will provide an example of an early memo I wrote:

Figure 8: Memo-writing entry

Having only/mostly expat friends	01.09.16
Socializing with expats is not an obstacle to connect with locals but rather the result of a number of factors that hinder connections with others. These are: language limitations, availability, and living within the expat community. Thus, not speaking Spanish, having free time, and living in areas surrounded by expats pose difficulties to foreigners when they try to create strong relationships with the local people.	

In this short memo, I was exploring why foreign owners mainly socialize with other foreigners in the city. Particularly, I wanted to understand some of the reasons why they gather more with people from their own countries or other English native speakers rather than the local

population. In the transcripts I found out that some of the respondents did not have close local friends. As I was reflecting and comparing data among participants, I could observe that language was a major barrier for connecting with locals. Thus, constantly writing memos helped me to refine categories and sub-categories that formed the main themes for the findings section of this research study.

### **3.5.2 Validity**

In qualitative research, validity is used to add credibility and accuracy of the study findings (Creswell, 2014). In this way, ensuring trustworthiness and transparency was a primary consideration as a researcher. One of the validity strategies that I employed was member checking with the participants. After analyzing the data, I crafted a one-page draft summary containing the main themes and sub-themes with a brief explanation of every topic. Then, I wrote an e-mail with a thank note and the summary as an attachment file to every one of the participants who provided a valid e-mail address. In the body of the e-mail, I kindly asked them to provide any comments or suggestions about the preliminary findings as well as to add any other information they considered relevant. Although only three participants replied, their answers helped me to recheck for accuracy of the data and enhance the representation of findings. For instance, Irene emphasized the lack of Spanish skills as an “outstanding handicap to making friends with the locals”. She went on and described it in her e-mail: “without this one ability, all connections become severely limited...which has a domino effect, as it makes a massive difference to how "at home" expats feel here”. This comment made me realize the great importance that language had in everyday interactions and the creation of relationships with the local people. Also, Clementine provided valuable comments on the strength of the relationships she has built in the city. She wrote:

In my experience, they [relationships] tend to be more intense than they are at home even if we spend only a few months out of the year in MERIDA probably because we are more available there than at home where we have family, friends and several commitments to fulfill.

Clementine made a very interesting point about the strong ties she has created regardless of the short time she usually spends in Merida. These comments were included in the discussion of the findings in chapter 5. Another strategy I used for validity was to record in detail the steps I followed throughout my research journey on my personal journal and my procedural memo. In this sense, keeping track of changes in questions, ideas that emerged after the interviews, organization of categories and sub-categories, comments about participants and their experiences, and personal thoughts served to enrich the descriptions of the research design and the outcomes of this study.

### **3.6 Ethical considerations**

This study received ethics clearance by the University of Waterloo Office of Research Ethics. Accordingly, several ethical procedures were considered to ensure the study participants confidentiality and security of data prior and after the fieldwork. Regarding the not-for-profit organization for recruiting participants, an invitation letter was sent via e-mail to seek formal permission from the Board of Directors. After establishing communication with the gate-keeper, the project was approved and the signed consent form returned to me. A pseudonym was used to safeguard the confidentiality of both the organization and the gatekeeper involved in this study. As for the selection of participants, an information letter and consent form was given to potential candidates for reading and approval if interested to participate. I also provided further information about the project and examples of questions involved in it. Remuneration was not offered in this study but participants were willing to give their time and share their experience with me at no in-kind or financial compensation.

During the interviews, participants were reminded about their voluntary participation in the study as well as their right for withdrawal at any time if they wanted to without any negative consequences. The research questions did not touch upon sensitive topics that may have caused harm to participants. In addition to that, a feedback letter was given for appreciation asking whether or not they would like to be contacted later to receive a summary of findings from the study. Data collected during the interviews was stored in an audio recorder. Soon after the interviews took place, I transferred the media files into my lap-top and erased the files from the audio recorder. These files were saved and encrypted onto my password protected lap-top. Likewise, an electronic file containing all personal information about the participants such as e-mails addresses, telephone numbers, and other confidential data was encrypted. Since the fieldwork took place in Mexico, all consent forms, my personal journal and other paper notes with information related to the study were kept in a locked drawer. No one had access to this information or had the keys for the drawer. While collecting and analyzing data, alphanumeric codes were used to protect the participants' identities. As for the findings presented in this dissertation, pseudonyms were assigned to each participant in order to ensure privacy and confidentiality. There were no known or anticipated risks to participants in this study.

### **3.7 Reflexivity**

Being reflective in qualitative research is to acknowledge that a researcher's personal background, experiences, and culture might influence the interpretations and meanings during the research process (Creswell, 2014). In this way, I consider it relevant to identify my role as researcher as well as my values and biases to position myself in the context of the study. In this section, I explain the connection I have with the study site, the research topic, and the recruitment place.

I am a Mexican citizen, born and raised in the city of Merida, Yucatan. Almost all my life I have lived in the city, except for the year I worked in the United States and the two years I studied in Canada at the University of Waterloo. I have also lived in Italy where I took an Italian language course for a few weeks. My passion for traveling and learning languages guided me to pursue my career in tourism and to be involved in the tourism industry in my country.

As for my research topic, I first got to know about *second homes* while I was doing my internship at the Ministry of Tourism in Merida. While I was reviewing the State Tourism Program 2007-2012, I found out that second homes were considered a special sector of the tourism industry along with cruise tourism, premium, and health tourism. One of the objectives of this program was to promote second home tourism as an expanding potential market in the state of Yucatan particularly attractive to American and Canadian retirees (Gobierno del Estado de Yucatan, 2011).

Years later when I was taking graduate courses, the topic of second homes jumped out again. As I was reviewing the literature, I began to make connections with my previous life experiences. When I was a little girl, my parents had a house in the beach 30 km away from Merida. It was our *second home*. My family and I lived in the city but we used to go to our beach home in the summers or weekends. Then, the more I read about second homes, the more I became fascinated with the topic. I was also aware of the presence of many foreigners living in the city through comments from relatives and acquaintances but I have not realized the importance of this until then. This was like a reinforcement to choose the topic of second homes in Merida as my dissertation topic.

As for the recruitment of the organization, the first connection I had with the place was in fall 2013. Since I was preparing to take an English language proficiency test, I began to look for

ways to improve my conversational skills. I came across this not-for-profit organization online and wanted to give it a try. I attended a couple of times a language exchange program where locals and English speakers engaged in informal conversations so both can practice English or Spanish. Although I did not continue attending because I enrolled into an English private institute, I really liked the opportunity to interact and speak with English native speakers. Remembering this experience gave me the idea to contact this particular place to recruit participants for my research study. It is important to mention that at the moment of contacting the organization in spring 2016, I did not know any person or member working there that could have easily granted me access to the place. I also did not know any of the participants who took part of the study. I got to know them while I was attending different programs during my fieldwork or I met them through others.

Before the interviews, I identified myself to the participants. I let them know that I was originally from Merida and I was a graduate student at the University of Waterloo. For me, disclosing my identity served two purposes. First, I wanted participants to feel comfortable and open to talk to a graduate student. Also, my idea was to show empathy with them by sharing something in common like living in another country. I intended to establish rapport so that they could reflect on their experience living in Mexico and connecting with people from different backgrounds as I was also experiencing myself in Canada. Nonetheless, I am aware that being local might have influenced the participants' responses in the study. I acknowledge that some participants may have felt the pressure to answer positively about the local population as I was myself a local. On the other hand, some participants shared negative opinions during the interviews and expressed themselves freely in trying to address the questions. After all, I believe I have balanced opinions from the participants' views about the city and people. I also want to

mention that handling negative comments challenged my views and my role as researcher. I did my best to remain objective and prevent these comments from affecting myself or the project. Moreover, I did not let prejudices and stereotypes of the participants' nationalities to influence the interpretations I was giving to their responses. My thoughts, perceptions, and reflections were recorded in my personal journal allowing me to express my feelings and ideas about things and opinions of others.

By identifying my biases and keeping a reflective role during the research process, I was able to capture the participants' reality as best as I could and give voice to their experiences of second home ownership and their social connections in the city. Furthermore, I had the opportunity to better learn about myself, my weaknesses and strengths, and to enrich my experience as a researcher and as a human being.

### **3.8 Conclusion**

This chapter outlined the design frame used for the present study. A qualitative approach together with a case study methodology facilitated the collection of the participants' experiences of second home ownership in the city of Merida, Mexico. Also, analyzing the data through coding in grounded theory served to form and develop categories into themes. Finally, ethical considerations and reflexivity were included as ways to promote the integrity of research and position myself in the context of the study. The outcomes of the data analysis are explained in the next chapter using a traditional representation of themes which are supported by direct quotations from the participants.

## CHAPTER 4: FINDINGS

This chapter presents the results obtained from an analysis of the participants' responses about their experiences as international second home owners in the city. Throughout the interviews, topics related to relations with others, difficulties for social interactions, communication in Spanish, importance of social connections, and participation in organizations were primarily discussed. Three main themes emerged in the exploration of the data. These themes provided insights on the diverse and complex social connections international owners and renters of second homes develop in Merida.

The findings are organized in three themes: connecting with others, encountering challenges, and accumulating social capital. The first theme *connecting with others* describes the different ways participants develop social connections in the city. The next theme called *encountering challenges* captures the difficulties participants face while trying to interact and create relationships with others. Last, the theme *accumulating social capital* presents the benefits participants obtain through social networks and the contribution they make to the community.

### 4.1 Connecting with others

The connections participants establish with others shaped their experience at the second home destination. These connections can serve as bridges as they make their way around and start to adjust to a different lifestyle. In the discussion of this theme, I illustrate how participants connect in several ways. Ranging from prior links to the place to not having any contacts at all; these first connections serve the purpose of getting immersed to the city and knowing others. Also, I show the importance that developing social relations and forming friendships had for the

participants in the study. Thus, three sub-themes are discussed: pre-existing ties to the city, meeting new people, and building relationships.

#### *4.1.1 Pre-existing ties to the city*

Some participants commented on having previous connections to the city before acquiring a second home. These included: spending vacations in Merida, having friends living in the city, and knowing local people.

For Eleanor, studying in Mexico represented an opportunity to travel to different cities in the country including Merida. She explained:

When I was young I studied at the Tecnológico de Monterrey [located in the city of Monterrey at northeast Mexico] and we used to come to Isla Mujeres. I came with my friends to visit and we passed through Merida. At that time Cancun didn't even exist as a tourist place, and so when I decided to, I always knew I'm going to come back to Mexico to live when my children are grown. I knew that all the time, I always said 'I'm coming to Mexico'. And so then I started thinking, I went to Guadalajara, I didn't like it anymore it changed and I remembered Merida is a very colonial city, let me see. So I came and I bought a house in the same day in the centro.

Thus, Eleanor's strong desire to live in Mexico and the return visit she made to Merida influenced her decision to purchase a second home in the city.

Also, Alex and Oliver visited Merida during their vacations. Even though the city was not an intended stop, their curiosity to explore new places brought them to the destination on their honeymoon. Oliver recalls the story of their trip:

Well, the first time we discovered Merida it was about twenty years ago. We were on vacations for a few weeks and we really loved it. Then we came back a few years after and we just said to ourselves well that would be great to be able to retire there and ten years after that, the dream came true.

Alex went further and explained the process of acquiring their second home: "We started planning on coming here so three months out of the year, four months at the time, for the last six years preparing for our retirement". In this way, the couple purchased their second home in

Merida and traveled back and forth to their country of residence in preparing for living in the city permanently.

For other participants, receiving invitations from friends already living in Merida served as a way to discover the city. Alison described the connection she had in Merida:

I have a friend that I've been friends with for over 40 years and she had moved to Merida. And when Patrick [her husband] was in Orlando and they were there and she says 'Alison, come and visit us.' 'Sure!' So, I came down, visited her and right away fall in love with this place.

Frank also shared a similar experience to Alison:

A friend and colleague of my wife's had bought a place in Merida and he had been all around Latin America looking for places and had chosen Merida for many reasons. So we came and visited him, stayed with him and we liked it and we came back a few times and finally we decided to buy a place here. And we spent the winters here and summers in Canada but now we have decided to move here and spend our life here.

Accepting this invitation was for Frank and his wife determinant for choosing Merida as their second home destination.

Furthermore, having acquaintances originally from Merida was another way to know the city. For instance, Clementine described her first visit:

I first came here with my Spanish teacher. I was taking Spanish classes at home and in winter we had 30- 35 degrees below zero for a month, so when the teacher told us that he was bringing a small group to his hometown [Merida] and that we would stay with families and we would have classes in the morning, I said to my husband: 'I'll go'.

She then continued coming back to the city and staying with families for a few times until she and her husband finally bought their second home.

These previous visits to Merida enabled participants to consider purchasing a second home in the city which has become a permanent residence for some of them. Moreover, these connections in the city, like friends and acquaintances, were a starting point for participants to get introduced into life in the city and know others. Next, I will explain how participants began to make their first contacts upon arrival to Merida.

### ***4.1.2 Meeting new people***

As described above, some participants came to the city already knowing other people like friends back home or acquaintances from Merida, but in some other cases participants arrived without knowing anyone. This sub-theme captures the ways participants got to know others including neighbours, local residents, and other foreigners. Also, I mention some of the places where they usually meet people and gather together.

In the majority of cases, participants expressed their intention and willingness to meet people when they arrived to Merida. As Natalie expressed:

If you don't get to know the people, you'll be very isolated, and if you're not going to get to know the people here, then just stay home. Yeah, don't come here because, you need to get out and need the people, learn the customs and the culture.

Thus, interacting and establishing connections with people was important for Natalie while living in the city.

Many participants reported immediate neighbours were their first contacts. Depending on the area they live, they could find local and foreign residents. For instance, coming across neighbours on the streets was one of the most common ways for participants to 'break the ice' and meet new people. Eleanor described her experience:

When I first arrived I met neighbours around, I met Mexican people, I met some Americans and you know I like it here because it's like the old south, I grew up in the south and the people sit in the front of their house. And so you pass by 'hello, good evening, how are you?' Yeah.

Similarly, Frank and his wife started to know their neighbours while walking down the streets near home:

We have some neighbours who are Canadian across the street, we know them. Some neighbours next door who are a Mexican-French couple. Besides, there's a Mexican man. We knew them from saying hello in the street and other neighbours Mexicans we see them and they know we're here.

In other instances, neighbours introduced themselves showing interest and friendliness towards the international second home owners. Patrick described his experience:

I met Enrique he owns a house [there]. I'm now painting the front, people walk by and they stop and they look, and then and he say 'hola, Ernesto, I live up with the bla bla house there'. 'Oh! Ernesto, Patrick', you know and then I met Rodrigo, lives next door he's almost never there. And then I met Alessandro, he's Italiano, he owns Napoli [an Italian restaurant on the same street].

Also, Rachel described the first time she met her friend from Merida:

I was walking to *Supercito* [grocery store] and Maria was walking down the street and she was on the other side of the park a couple of blocks from here. And Maria came up to me as she was passing and said 'oh! are you the new person living on the street?' and I said 'yes' and she says 'I'm Maria' and she said and described her house but we couldn't speak for very long and then I didn't see her for a couple of months. And then, we became friends and her family after that.

For Rachel, finding local neighbours who happened to speak English was very helpful since she was able to communicate in her own language.

Besides knowing their immediate neighbours and people around, participants also mentioned meeting other English speakers in the neighbourhood they lived in. As Mike noted:

The classic is as we were buying paint for the house here we're down to the little *Mexco* [paint factory]. And as we're coming out we're talking to each other about pricing and everything else because little unusual thing happened while in there so, we're talking about it as we're coming out and all of the sudden a voice behind said 'I hear English'. And we were out for dinner with them two nights ago.

His wife, Emma, added: "So now we see them regularly. They also go to the symphony we have tickets to the symphony. We meet them at the symphony usually".

Similarly, Nick and Helen met other people English-speaking people while they were grocery shopping. She recounted this story:

We met somebody who was looking for something in *Go Shop*. Yes! He wanted whipping, he said 'is this whipping cream?' and I said 'no is not, that's sour cream' and he said: 'oh my wife wouldn't like that'. So we talked to him for a few minutes anyway. We see them all the time now.

Indeed, speaking the same language brought participants together and, at the same time, created connections that further evolved in friendships.

Additionally, some participants mentioned attending parties and hosting dinners as an opportunity to meet others. Emma explained:

It tends to be private parties, so we know so-and-so and she has a party and we go to the party and there's other people there we never met before so we meet them at the party.

Also, Clementine shared her experience:

We visit one another. Yeah because I have the smallest house, and my house is not so small. They have huge houses. [Interviewer: Do you usually host dinners at your home?] Yes, we all do that.

Thus, get-togethers were a regular practice among participants that served to connect with others and gather with friends and acquaintances.

Another way to meet new people was through organizations. Many participants mentioned *the Bookshelf* and *Les Femmes* as the most important ones. These not-for-profit organizations offer a number of different activities and programs for their members and non-members to socialize with others. Nick and Helen regularly attend events at *the Bookshelf*. She described their experience as follows:

*The Bookshelf* has a sort of get together on the third Friday of the month, yes social nights and they also have wine tastings and the conversations [language exchange]. And we've also been to the art studio tour once and the trip to Valladolid [a city in the State of Yucatan]. They had a trip to Valladolid recently we went to that, so I think we've done a lot of things. But they have some other events. There're some new things they started there's a Scrabble group and a bridge group and there's some writers on Wednesdays, English and Spanish writers. We've been to all kinds of things.

Also, Eleanor illustrated her participation at *Les Femmes*:

I belong to *Les Femmes* and which is mostly for women you know American or Canadian. A lot of women who are American or Canadian married to *Yucatecans* [from the State of Yucatan] and there are some *Yucatecans* that they are married to an expat because the club is in English. So, we have a lot of activities and I do go to those and I do have American friends that I hang out with um so I would say I have more Mexican friends than Americans but I have also lot of American friends too.

Both organizations run a variety of programs attracting principally native English and other local attendees. This was an opportunity for participants to socialize and get to know others.

Lastly, few participants mentioned places where they gather at specific days and times. Some of these restaurants and bars were commonly known to be meeting points for other foreigners. Patrick explained:

Sometimes on Friday night I go down to the *Bavarium*, you know? [Interviewer: The German?] Yeah the German place. Well there's a group of American guys and a couple of Canadian guys too that hang around there on Friday night at 5 o'clock and so I go in there, and first of all the company is nice and so we're all just discussing things but I learn a lot of things.

Also, Clementine mentioned another place where she usually goes to with her foreign friends: "Often times to *St Pattie's*. [Interviewer: The Irish pub?] Yes, the gathering place".

Alison expanded on *St Pattie's pub*:

It's a meeting place for a lot of expats, a lot of expats meet in *St. Pattie's* and any time you go, you're gonna see expats there. They have all sorts of parties for the expats and the couple that owns it is a gay couple and they're both from Ireland, I think. They're very nice guys very friendly and movie nights and different events, the Saint Patrick's party of course.

These gathering places are commonly found in the downtown areas offering participants a space to meet compatriots or other international residents. These restaurants organize events and special nights where the presence of English speakers is very common.

Overall, this sub-theme illustrated the ways participants meet new people which included greeting their neighbours in the streets, talking to other foreigners when hearing their language spoken, and attending social gatherings. In the next sub-theme, I address how participants go from meeting people to developing strong bonds with others.

### **4.1.3 Building relationships**

Creating social relations represented a significant part of the participants' experience as second home owners in Merida. This sub-theme illustrates the aspects of relationship building in the city that included sharing similar interests, spending time together, and selecting friends.

Meeting people gave participants the opportunity to develop social relations. Hailey shared this advice: "A very good friend of mine said 'what you need to do is to meet as many people as you can and sift them and then you'll end out with a few good contacts'".

Clearly, having an open personality and demonstrating interest in others represented a plus that allowed participants to build relationships easier. Alison described:

And then when you go to a restaurant, you hear people speaking English and you start talking. When we moved here um we start... Patrick is especially friendly so he [just] starts talking to them and if they had any English and if they don't they're just sign language how are you, hello, and we meet a lot more people that way.

In contrast, Irene recognized being less social than others:

I'd rather believe it or not, um I'm a bit of a hermit...I need a lot of space I need my, you know I enjoy being alone. So I'm not particularly sociable but I do like to go out occasionally for lunch or something like that with people but I'm not a party person.

Thus, Irene was not intentionally looking to meet people nor making new friends as part of her personality.

In addition, almost all participants agreed that having similar interests was key to build relationships in the city. Emma and her husband put it this way:

I was talking to [one of their friends] we were saying you make friends a little faster I think. Whether it's because we're retired and we know we're nearing the end of our life, so and we meet a lot of people that we have more in common, I think. But I think it's because, we think it's because any English speaking person who wants to come to a country they don't speak English tend to have a sense of adventure. So there's something in common I think, you know. A good chance for meeting people that we enjoy.

Mike added: “Very different backgrounds, but similar kind of direction of where we're going”.

Indeed, the couple was drawn to people they share things with like their native language and common lifestyles.

Moreover, building relationships was seen as an ongoing process as Alex noted:

We're continuously making new friendships. Our next door neighbour invited me to learn how to cook *cochinita pibil* [a traditional dish], to cook different other things at her house so, we basically, anybody that we meet if we have something similar or something in common.

For Alex and Oliver, having similar interests and learning new things enabled the creation of closer relationships with others.

Another important aspect that helped maintaining social relations among participants was the investment of time. For instance, Eleanor pointed out:

In life the most important thing is the relationships that you have with other people and, so that's what makes life worth living I mean if you don't have friends and those relationships...and I think that is what I like so much is that you have very good relationships with your friends and neighbours here that you take time for each other that you know all of the you know there are so many festivities here and you go to all of the parties together and you do things together.

Thus, seeing her friends often and having get-togethers with her neighbours help nurturing those relationships over time.

Also, participation in social activities was relevant to keep social relations alive. Frank gave some examples such as sports, board games, shopping, movies, art exhibitions, and the symphony orchestra. Like Frank, almost all other participants mentioned attending local events and concerts of the Yucatan symphony orchestra with friends.

Further, the selection of friends seemed to be a carefully planned strategy for some participants. Alex described it this way:

Well, we made a conscious effort actually saying that when we arrived here, we could have easily been introduced and accepted in *cliques*, groups of people that we're either artists, that were from certain countries and we consciously avoided that, to not be part of

a *clique*. We made friends with multiple people from different *cliques*, but not because they were part of the *clique*. We did not move here to live the experience of Canada or to live the experience that we had. So we made a conscious effort from the very beginning to do that.

Oliver went beyond and added: "Since we are Francophones, so there's a lot of Francophones, a community here and there is the American one, the Canadian one and so. We participate in some events but we're not part of any group". For them, knowing what to look for in a friend upon their arrival was an important consideration to build their circle of friends while living in Merida.

Indeed, this process of choosing friendships responded to particular choices and preferences. As Eleanor described her strategy:

I'm very particular about my friends so you know I distinguish between friends and acquaintances so, friends that I have chosen whether they're be American or Mexican, I don't see a difference. Acquaintances you know Mexican people are Mexican people and American are American. There are a lot of American people here that I don't particularly care, I don't like their behaviour, I don't like lots of things and so they're acquaintances but not friends. The nationality makes no difference to me, it's their behaviour.

In her case, behaviors rather than nationalities influenced her decision of whether strengthen those relations or not among the multiple contacts she had in the city.

Finally, participants recognized the value of their friendships and the strength of the relationships they have created in the city. As Nick noted:

Actually we've made more new friends here than we have at home for many many many years because well, if somebody speaks English and they are already here then we have a common interest of Merida.

Similarly, Clementine explained how her friendships in Merida differed from the ones she had back home:

The only aspect that I experience differently is about the strength of the relationships we build among expats. In my experience, they tend to be more intense than they are at home even if we spend only a few months out of the year in Merida probably because we are more available there than at home where we have family, friends and several commitments to fulfill.

After all, Clementine had created strong bonds with other foreign residents although she did not live full time in the city.

Additionally, Alex commented on the meaning of the relationships with the local people:

For here, everyone is an amigo [friend]. However, when you want to really say a friendship, “tu eres mi hermano, hermana y tu eres mi hermanita” [you are mi brother, my sister, and my little sister]. Es una segunda familia [it’s a second family] and the sensitivity of that is felt. And the welcome here is amazing.

For him, creating familial bonds with local friends was a very important part of his experience in Merida.

Hailey also echoed this sentiment as she noted:

I’m very lucky that I have a Mexican friend, a man, who is not boyfriend, he’s my friend and he calls me his sister and he takes care of me, he ...I’m really lucky to have him and he loves me so much and that, it’s just I love him and um that is quite unusual having that. I don’t think many foreigners have that kind of relationship.

Indeed, Hailey recognized the enormous value that friendships had in her life. Considering a friend a brother speaks of the quality and strength of the relationship she had built.

This sub-theme has illustrated the most influential aspects of the relationship building process of participants within the broader topic of connections with others. Through experiences of finding people with similar interests, spending time together, and selecting friends based on individual preferences we have observed the ways participants build relationships in the city.

In sum, social relations are crucial for the participants’ lives in Merida. Notably, connections in the city included previous ties, meeting new people and building relationships. These three elements formed part of the participants’ experience in the place they have chosen as their second home destination. While for some participants meeting people and making friends was an easy and ongoing process, for others creating social relations was difficult and sometimes problematic as it is illustrated below.

## 4.2 Encountering challenges

Interacting with others and building relationships was especially hard for some. Even though most participants believed locals were friendly, nice, and generous; creating stronger bonds with them was challenging. Communication in Spanish, cultural differences, perception of wealth, and availability to meet with others were identified by participants as barriers that hindered social connections. Moreover, differences among groups of foreigners created tensions and disapproval. This theme captures how these obstacles affected the way participants developed social relations with other residents.

### 4.2.1 Communicating in Spanish

Not being able to communicate in the local language presented a major barrier to connect with the local people. Some participants expressed having almost none or little knowledge of Spanish. As Helen noted: “It's not hard to meet people but our Spanish isn't good enough to make friends with Spanish speakers”.

In a daily basis, social interactions with locals while making purchases or getting services was complicated for some. To illustrate this, Patrick explained:

When I go to a store to try to buy something and they have no English and I have almost no Spanish so there's no, you can't communicate and is not that they don't wanna help you, is they can't and even with the taxi, I call for the taxi and I, now they know who I am, and I give them my telephone number and they say: ‘ah Patrick, 55 bla bla...’ *si, si* but if the taxi doesn't come I cannot call them up and say ‘I called for a taxi but the taxi didn't come yet’, I don't know how to say that so you know there are, so those are some of the deaf lines. I think the difficulty is with the language not with the people. I'm never had anybody really rude to me or no, no they're all been nice. They just can't help.

Indeed, Patrick recognized that locals have treated him nicely but he hasn't been able to communicate with them due to language limitations.

Natalie lamented the fact of not knowing her neighbours better: “I can't with our language restrictions ‘cause I don't really speak Spanish, so we're limited because of the

language differences, but they're very friendly and I really, really like both of my neighbours". In the case of Natalie, having a deeper relationship with other neighbours was hindered because of her inability to communicate in Spanish.

While for some participants speaking Spanish represented an opportunity to better connect with others, Rachel viewed it as a way to improve the relationship with the people she already knew:

It would be nice if I'd be able to speak Spanish because Maria [her Mexican friend] and her brother-in-law are the only ones who speak English and it will be wonderful to have more than very short conversations with her mom and her sister.

For Rachel, having a better communication with her friend's family was more important than making new friends.

Clearly, the lack of Spanish skills affected the way participants build relationships with others. As a result, they socialized and established connections primarily with members of the foreign community.

Many participants admitted having only or mostly foreign friends as Helen expressed in a regretful tone: "It's all expats...all expats which is kindda sad but there it is". To which her husband replied offering a glimpse of hope: "Maybe if we become fluent in Spanish. We can invite Spanish people for drinks" showing his intention to eventually connect with locals.

Emma echoed the same sentiment: "Most of our friends are from other countries like expats...Yeah". On top of that, she and her husband expressed their frustration for constantly meeting other English speakers:

We don't wanna meet more expats, we keep meeting expats because you know our friends are expats, and then they introduced us to other friends who are expats, so we don't need to meet more English people, we'd like to meet more Mexican people but hopefully that will happen, I don't know...

Even though Emma and Mike expressed their desire to make Mexican friends, they were continuously growing their circle of foreign friends.

Frank went beyond and explained the situation:

It's um for most of the expats language is a big thing. Most of them don't speak Spanish but even though I speak Spanish well and my wife does too it's just, it was very convenient because the foreigners are all new so they're looking to make friends.

Despite their knowledge of Spanish, Frank and his wife preferred to build relationships with people from the foreign community for practical reasons.

Hence, being unable to communicate in Spanish represented a significant barrier for the creation of social relations with the local people. In the next sub-section, I illustrate how differences in culture can further complicate these relationships.

#### ***4.2.2 Adjusting to the culture***

Cultural differences can hinder the creation of closer ties with the local residents. One aspect of culture that can be especially challenging for participants looking to build relationships with locals was the value Mexicans place on families. This has created surprise and even disappointment. Clementine emphasized: "It's almost impossible to make friends with Mexicans, I tried a lot. Because *Yucatecos* are all about families, just families, families, families, families..." Then, she gave more details about her experience:

I would like to make friends like I'm taking private belly dancing courses [with a Mexican woman]. And she's lovely, she's really lovely. She's a biologist and last weekend I sent a message 'are you available to do something over the weekend?' and the response I got was 'I'm with my family'. So, I was disappointed because she's at least 24, 25, 26, I don't know and I mean in Canada when you're that age, you're not with your family all the time.

Despite her intentions to make local friends, differences in priorities and expectations have frustrated her attempts.

Irene also shared the same opinion pointing out difficulties not only in building relationships but also in adapting to the local culture:

It takes a while to adjust to the fact that families here are the most important thing. So a person can make an arrangement with you to do something but if anyone in the family you know wants anything at all, you know. One time a friend was to come over and then he said 'I can't come over', I said why not, and he said 'my grandmother wants us to clean the house'. It's like what? In England we'd say 'I'm sorry I have another engagement' you know some other time.

Moreover, Hailey described the reasons why she thinks this might be based on her experience living in Merida: "Well... is not so easy to break into a family, is not so easy because families are so...united they have the older generations and they're so self-sufficient, they don't really need anybody else..." Although Hailey is a fluent Spanish speaker, she still finds hard to fully integrate into Mexican families.

Besides cultural norms and values, the perception of wealth complicated the interaction between some foreigners and local residents. I will explain this further in the following sub-theme.

#### ***4.2.3 Being seen as wealthy***

A small number of participants described how owning a second home and performing renovations on the acquired property can affect the locals' perceptions. The difference of class status became more noticeable when local labour is hired for the construction works. In some cases, being seen as wealthy altered the interaction with members of the local community. Hailey put it this way:

Well, I know that I'm seen as very rich and that is a problem. When I started to do the renovation and people would come in and you could see their eyes you know saying 'oh dollars, dollars dollars' and that was very annoying because I'm not rich I just happen to work part of my life, I brought here some money but is not like that I'm rich.

Clearly, this misconception caused discomfort to Hailey as she did not consider herself affluent. In turn, her savings back home allowed her to purchase a property in the city.

For Clementine, being considered rich affected her attempts to relate with the locals:

Actually it's just that you got not to try to get close to most of them because if you go to the market people are very very nice. Anywhere you go people are nice is just not to get close. You cannot be a friend you cannot be friend because it's like if you try to be friend they see dollars in your eyes. That's all I've seen, that's all I have experienced. Yeah and I don't know if it will change, because I talked to a few Mexicans who said to me who studied abroad and they said that Mexicans do that to Mexicans. To take advantage. [Interviewer: Well, some people do that but not all of them]. I suppose, but those who want to be with us, that's what they want.

This perception conflicted with Clementine's intention of developing relationships with locals. Moreover, previous negative experiences in the city had affected the image she had about the Mexican people.

In this sense, different perceptions of wealth complicated social interactions with some local inhabitants. Although participants did not consider themselves affluent, a disparity in class status created feelings of suspicion and distrust towards the local people. In addition to that, temporary stays in the city affected the participant's connections with others as it is discussed below.

#### ***4.2.4 Staying temporarily in the city***

Some other participants indicated that staying just a few of months out of the year in the city presented difficulties for maintaining relationships with others. As Helen and Nick noted:

One of the problems for us is that we aren't here long enough. Our friends say, the people we go out with...say some things about how busy we are when we are here. When they are here for 5 or 6 months they don't feel any need of get busy you see. And there I am saying we haven't seen so-and-so we have 4 days left you know like that.

Even though they wanted to meet their friends, seeing them all was hard for Helen and Nick because of the short time they spend in the city during the winter months.

Mike also described how this temporariness affected his and his wife's friendships:

Some of them [local friends], we still have, one of the guys that was a worker here during the renovations that you know I guess he's become a friend and you know. We help them out a little bit when he had a few problems with his vehicles and stuff and but he's still um he's with all this situation I mean he's... we think single except that he has a girlfriend that it doesn't sound like a strong relationship she's from anyway on and on and on but you know it's tough maintaining some of those relationships when we go away for 6 months. Like but end of last spring it was really close, he and I, he was helping us out in doing things.

In this case, Mike recognized having difficulties for strengthening this relationship due to time limitations.

On the other hand, participants who stayed in Merida longer experienced the same difficulty the other way around. For instance, Natalie explained the dynamics of the relationship she had with her seasonal friends:

I have some friends but they're only here for a few months in the winter yeah and so like the first winter they were here we did a lot of sight-seeing together. Just go catch a bus and then go to a different place. Yes, out of town, lots of the out of town places.

Although she did not see them all year round, she made the most of the time when they are back in the city.

Similarly, Irene did not meet her friends often as she noted: "I, you know not so much lately largely because quite a number of the people I know at the moment have gone back to Canada or the U.S."

As it could be observed, both temporary and permanent residents experienced difficulties in nurturing their social connections. Thus, temporariness affected the frequency of contact and time spent with others while interrupting the flow in the relationships. Finally, different perspectives caused tensions among foreign residents as is explained next.

#### *4.2.5 Tensions between groups*

One important aspect that emerged during the interviews was the negative opinion some participants had about other foreigners living in the city. There was a distinction between those who attempted to speak the local language and tried to integrate into the community and those who socialized among themselves and complained about the city and the local people. For instance, Natalie expressed:

Do I need to spend an incredible amount of money to live with the expatriates? I don't think so. I knew I was not gonna like people who lived in gated communities. I knew the people who lived in gated communities in the U.S. and they wouldn't like to live here. 'My stuff is more important than yours and I'm better than you'. No, no. [Interviewer: So you don't want to be part of the expat community?] No, I don't. Well, I don't want to listen to somebody who says: 'I hired this guy that is a plumber and did a terrible job and the rest of Mexico is all the same way'. I'm not looking into that. And you said he's an ignorant and obviously you're an ignorant person when you moved from the U.S. and you didn't change very much when you came here [...] And you wonder whether they will be part of the community or whether they want to be part of the expatriate community.

Natalie's impression of other foreigners was influenced by previous experiences back home and other friend's comments. As a result, she was wary about establishing connections with the foreign community. Instead, she preferred to make friends with local neighbours and friends of friends nearby as she did not live in an area commonly inhabited by foreign residents.

Hailey also shared her opinion of other foreigners:

There are a lot of Americans here that I don't like at all. [Interviewer: how come?] Well because they are not very well educated, they're just here because it's cheap, and all they do is complain and talk about their houses and the plumber and the builder and this and their neighbours, and bla bla bla they don't like the food, they think it's too hot so I keep away from all those people.

Indeed, differences in attitudes led Hailey to form her circle of friends outside of the foreign community. Moreover, she pointed out a particular group of people that she disliked the most among other nationalities.

Similarly, Alex and Oliver expressed their opinion about a certain group of foreigners.

Alex explained:

Well, there's one group [Oliver: More North Americans] that prefers to take time to teach people from Merida English rather than learning Spanish themselves. I find that so insulting. It's such... for us it's the rudest thing that I can think of to come here and I'm sorry but to me [...] it's that North American colonization mentality that I can't handle.

Then, Olivier added:

And also we hear a lot of negativity and there is sometimes you have to switch living here especially when you own a house. But at one point seems that is always the same conversation that come up about the home, what there to repair, the worker didn't show up or whatever, you see at one point it seems a bit tiring.

Thus, behaviours and actions displayed by some foreigners caused discomfort and disapproval. So, they preferred to relate with people from other nationalities and groups.

Additionally, Frank made a distinction of the foreign residents living in Merida:

The people who are here permanently don't tend to mix as much with the snowbirds because during summer while the snowbirds are north they continue to, the people here full time continue to see each other and develop relationships, kinda loose a bit of contact you know with the snowbirds. And they're concerns are different than the people who live here permanently they're not on holiday, it's home [...] Snowbirds are more on holiday and interested in entertainment and things like that. So people who just arrived wanna know where to go shop or mall. People who have been here a while and know all that they don't want the same conversations over and over. And we're sort of halfway.

In Frank's opinion, relationships between temporary and permanent residents tended to be more superficial due to the variation of purposes and time spent in the city. In this way, their intentions to relate with others and create social connections differed in terms of frequent interaction and expectations.

In this theme, communicating in Spanish, adjusting to the culture, being seen as wealthy, and staying temporarily in the city posed difficulties for interacting and connecting with local and foreign residents. These barriers impacted the participant's intentions to create strong bonds with the local people. Also, participants' disagreement about some attitudes and behaviors of

other foreigners affected the way they related to each other. Despite these difficulties, participants are expanding their social networks allowing them to ‘get by’ and ‘get ahead’ in different aspects of their experience as international second home owners in Merida. This is further discussed in the following theme.

### **4.3 Accumulating social capital**

As noted above, participants’ connections in the city of Merida were analyzed using the notion of social capital. This theme captures the types of social capital enabled by participants and provides examples as to how they were ‘getting by’ and ‘getting ahead’ while living in Merida. First, I explain and reflect on the profits participants received as individuals in terms of practical and emotional support as well as other forms of assistance. Then, I discuss the participant’s voluntary contribution to the community as a way to generate collective social capital.

#### **4.3.1 ‘Getting by’**

Many participants recognized obtaining support through their networks of neighbours and friends. This has helped them to ‘get by’ in their everyday lives in the city. As an illustration, Helen and Nick explained how getting help from others has proved to be useful:

Well, the people that we know here have helped us find things that we need or they have told us about events. Or they have tools which we can borrow. Yes! A mason drill. Or a longer ladder you know we know people in the street that have these things. So they’re very helpful. Yeah, and we can get the benefits of their experience and where to find things because it becomes quite difficult especially when you are new here.

Thus, these social networks had provided Helen and Nick with tools for their home and other valuable information that had helped them while staying in Merida during the winter.

For Irene, relying on her social connections has been very beneficial. She noted:

When I first came, it was really helpful because you don't know how to find this and the other, things that you can buy overseas and you don't know where you can find it here and that kind of thing so it's useful from that point of view. And just to get a general understanding of just a general understanding of Merida, the people, and so forth.

Besides receiving help for practical things, learning about the culture and customs was important for Irene's experience in the city.

Moreover, Eleanor explained how her friends have given her emotional support and assistance:

I have very close friends that and it depends on what my problem is, I will just call them. And that's one of the wonderful things about being here, I could call them at 3 o'clock in the morning, and in 5 minutes, they're gonna be here. I can call them with any problem and they're gonna help me, whatever I need, I need this, 'Eleanor what do you need? I'll pick it up for you'.

Eleanor's friends cared about her in difficult times no matter the circumstances. The strength of the social networks she has built has been very supportive and valuable.

In this sense, participants get the benefits from the social connections they have built in the city whether they are foreign or local residents. This has been helpful to obtain support and create a network of people who can count them on during difficult situations. Next, I illustrate how participants were able to 'get ahead' in other circumstances.

#### **4.3.2 'Getting ahead'**

Several participants admitted that expanding their social networks has allowed them access to other resources beneficial to their experience in Merida as second home owners.

Rachel usually referred to her local friends for health-related problems. She explained:

[Maria's] sister is my doctor. She has worked in a clinic for like 25 years. So, she knows all the doctors. She has access to doctors. When I had dengue she said 'you got chikungunya or dengue'. So the next morning, Maria put me into a taxi and someone from where she was working took blood and she said, the next afternoon she said 'well, you don't have chikungunya which is good but you got dengue' and you know '*reposo, reposo*' [rest, rest, rest].

In case of illness, Rachel had access to medical assistance through a well-connected friend in the local hospital.

Similarly, Hailey benefited for the contacts she has made in her neighbourhood. She shared this story:

I was looking for, I don't know if something happened in the street and we're all out talking. There was a electrical failure or something...Oh! that's when I remember. There was, all the cables along here suddenly caught fire and the whole thing was [making noise]. Everyone ran out, so all the neighbours really got together and then we decided to make a little group and I took everybody's names and phone numbers so if we could be united if there's a problem we could be united together. So I got talking to them and it turns out that they are publishers and I was looking for somebody to publish my book and so they published it.

For Hailey, establishing links with her neighbours was helpful in terms of finding the right people who collaborated in the publication of her book.

Mike also talked about the benefits of creating a social network comprised of both local and foreign residents in the city:

I think those kinds of contacts, relations, to find people that you are comfortable with and that you like and are good will depend often a lot on developing your local contacts, people who know people locally. Networks and we've already seen that with you know for instance the guys that are working on the roof are here because of a friend who has a really good contractor who came and studied the thing and you know the relationships. So I think as we spend more and more time here and we'll find ourselves more and more dependent on that local workers, local people and a lot of that is you know is word of mouth and relationships and recommendations.

Mike and Emma placed an important value to the social relations they had in the city. These relationships had helped them to connect with people, get services, and find local employees for their needs.

Indeed, participants were 'getting ahead' in several situations and obtaining benefits for their individual needs due to the social networks built in the city. Further, the research made clear how participation in social groups and volunteer activities can contribute to accumulate collective social capital.

Most participants were voluntarily transferring knowledge, skills, time, and financial support to the community. In particular, some of them have joined organizations or run projects by themselves. Surprisingly, the importance of helping others was recognized in almost all interviews.

Some of them reported being part of not-for-profit organizations such as *The Bookshelf* and *Les Femmes*. Besides running social gatherings and programs, these organizations also organize fundraising, charity events, auctions and special nights where members can donate goods or money to the local community. Oliver described an event run by *the Bookshelf*:

We participated in a fundraising for Telchac students. They do every year a fundraising so we went to Telchac [a village in the Yucatan State]. So you pay a certain amount and you can go. And it was a fine cause and the event was great but we're not part of their group.

Although Alex and Oliver are not currently members of *the Bookshelf*, they participated in a special evening to raise funds for students of a local association.

As well as belonging to these organizations, Helen and Nick donated English teaching materials and supported disadvantaged students in a scholarship program called *Fundacion ayuda a un estudiante* ("*Help a student*" Association). About this Helen expressed: "I guess, we are not doing too badly. That's a couple of two or three charitable things we do while we're here". Despite the short time they spend in the city, they contributed to the community in several ways.

Whether it is the transfer of knowledge or skills, participants described some of the activities they usually get involved in and the reasons to participate. Frank explained: "I work for a school, for handicapped children called *La casa de los niños* (*The house of the children*). I taught English there, I teach swimming in the pool to the kids, and I help with fundraising". He

went on and added: “It was an American couple that needed some volunteers to help with swimming and from there I started doing other things”.

Like other participants, Frank received an invitation from among his social contacts to belong to *La casa de los niños*. He also demonstrated the initiative to engage in other projects within the organization.

In the case of Natalie, her enthusiasm and desire to give back to the community encouraged her to create what she refers to as her *little project*: “I sew dresses for the girls and little pants for the boys at the orphanage in Merida”. She explained how the project began:

I acquired a sewing machine but I have an acquaintance that um [...] she's Canadian so, when I got the sewing machine and I said ‘I would like to do something like that’ she said that she volunteered at the orphanage I said ‘well then can you get me in touch with the person I would be to’ and she said yes so she got me in touch with another person who is also an expat. And so, I make the dresses and give them to her and she takes them [to the orphanage].

Through networking, Natalie made use of her sewing skills to help the children at a local orphanage.

Also, Rachel shared her voluntary contribution to the children:

Teaching English has been a very incredibly positive experience. When I'm walking my dogs in the evening all the kids are playing soccer in the park and they say: “hello teacher, hello teacher”... My Saturday class is about, I manage to squeeze in 11 kids. But on Tuesdays and Thursdays, I have class at 7 pm but some of them just don't come for their classes. Well I have to tell you there are 2 mothers who are very very committed to their kids to speak English and bring them here. [Interviewer: and, how old are they?] They're 5th and 6th graders.

Hence, volunteer participation in activities, programs or informal projects was an important part of the participant's experience as second home owners in Merida. In this sense, most of them were helping others in the community and therefore, contributing to the accumulation of collective social capital.

This theme has illustrated the ways participants obtained support and access to resources through social networks that enabled them to ‘get by’ and ‘get ahead’ in their lives in the city. Additionally, some of them were giving their time, expertise, and monetary donations to help the community and the local people.

#### **4.4 Conclusion**

To summarize, this chapter described the results that emerged from the analysis of the participants’ experiences on second home ownership. The main themes of this study included connecting with others, encountering challenges, and accumulating social capital. It is important to mention that although participants’ length of stay in the city varied considerably, they shared similar experiences regarding relationships with other residents. This study provided significant insights from the multiple social connections participants develop in Merida. These findings are further discussed in light of existing literature in the following chapter.

## CHAPTER 5: DISCUSSION

The purpose of this study was to explore the social connections of international second home owners in the city of Merida, Mexico. Findings of this study revealed the strategies participants used for meeting others and forming friendships. Also, barriers such as language, differences in culture, and tensions among foreigners complicated social interactions and relationships with other residents. Finally, an exploration of the social networks offered insights into the types of social capital generated by participants at an individual and collective level.

The aim of this chapter is to describe the main findings and offer additional insights in connection with relevant literature on second homes, international retirement migration and social capital. Drawing from the three previous themes presented in the findings section, this chapter is also organized in three sections: multiple connections in the city, challenges for relationship building, and social capital generation.

### **5.1 Multiple connections in the city**

This study advances our understanding on the ways transnational second home owners interact and connect with others in the city of Merida. Regardless of the publication of a few studies focusing on the host-guest relationship at the second home destination (Buller & Hoggart, 1994; Lipkina & Hall, 2013; Müller, 2002b; Volo, 2011), the diversity of social connections second home owners establish with other types of residents remains under researched. Hence, this study helps to address this gap by providing a broader perspective of the second home phenomenon where multiple relationships with local inhabitants and foreign residents are explored. This section is divided into four sub-sections: drivers for second home acquisition in

Merida, previous connections to the city, opportunities for meeting others, and aspects of relationship building.

### ***5.1.1 Drivers for second home acquisition in Merida***

Although understanding drivers for second home ownership in the city was not a stated purpose of this study, important insights as to why people acquire second homes in Merida were developed. As Coppock (1977) noted in earlier studies, the principal motivations for second home ownership were: recreation, investment, and retirement. Findings showed that some participants acquired a second home in Merida to use as a vacation retreat during the winter season. Since winters in some parts of North America tend to be cold and long, spending a couple of months in a warmer destination was a relief noted by participants. They appreciated the fact of going out without a jacket or having a drink in patios anytime during the year. After spending some winters at their second home property, some participants have considered relocating permanently. They recognized to be pleased about the place, the weather, and people and to be satisfied with their lives in the city. Some of them mentioned having a relaxed lifestyle or expressed their willingness to spend their retirement years at the destination. As Hall and Williams (2002) previously noted, second home ownership might precede permanent migration. This means that second homes can become primary residences to their owners. For instance, Müller and Marjavaara (2012) found in Sweden that some elderly adults have moved permanently into their second homes. These moves were mostly linked to life changes such as retirement. For some other participants in the present study, acquiring a second home in Merida was principally for retirement purposes. Some of the reasons for choosing Merida as a retirement destination included warm weather, cultural events, safety, cheaper costs of living, and health care. In other cases, participants were looking to experience life in a different country or learning

a new language. Overall, participants expressed their satisfaction for choosing the city and showed no regrets for leaving their home countries. Finally, few participants commented on leasing their second home while they were away. This responded to the investment strategies of second home use mentioned in other studies (Norris & Winston, 2010; Paris, 2014). Thus, second homes were purchased in Merida for three main purposes: recreation, investment, and retirement reinforcing previous literature on second homes (Coppock, 1977).

One important aspect to mention about the second home acquisition in the city was the selection of a specific area to live. Some participants acknowledged the large presence of an expatriate community living in neighbourhoods near the city's downtown. As many American and Canadian retirees make their residence temporarily or permanently in these areas, the presence of English speakers is prominent. This suggests that potential second home owners might be purposely selecting one of these neighbourhoods so that they could find compatriots or other Anglophones to interact and socialize with. However, more studies need to be done to explore the relationship between neighbourhoods and residents as drivers of second home ownership in particular areas. In this sense, it would be interesting to observe if the selection of a specific location affects the way participants relate with others and form friendships.

### ***5.1.2 Previous connections to the city***

For some participants, traveling to Merida and 'falling in love' with the place influenced the decision to purchase a second home. Also, visiting friends and acquaintances already living in the city reinforced their decision to acquire a property. Thus, these first connections represented an important part of their experience since they had the opportunity to view the amenities and experience life in the place by themselves. In this sense, participants were not totally strangers to the city but instead they knew people who welcomed them and helped them

upon their arrival. Moreover, they had the opportunity to connect with others because of the friendships they already had in the city. These findings can be linked to Haas and Serow's (1997) study of retirement migration in North Carolina, United States. Pre-existing ties to the community such as friends became a very useful source of information when relocating to a place. Moreover, frequent visits to the same location had a considerable impact on the potential migrants' decision to move to an area already known to them. Hence, previous connections to Merida influenced the participants' decision of purchasing a second home as well as enabled the possibility to get to know others through their social contacts. Whereas some participants counted on these connections, some others had to start from zero and meet new people. The next sub-section describes the opportunities participants had for knowing others and making friends.

### ***5.1.3 Opportunities for meeting others***

Findings showed that social interactions took place in different spaces and situations. As discussed by participants, meeting others began upon their arrival to the city. First encounters occurred principally on the streets, in convenience stores, or in the plazas around their neighbourhood of residence. In surroundings areas of the city centre, it is very common to find different types of residents such as locals, tourists, snowbirds, or expatriates. This allows international second home owners to meet a greater variety of people compared to other less central areas. Moreover, the disposition of houses in these neighbourhoods facilitated encounters among residents. As Rye asserted (2011), *social proximity* gives residents the possibility of interacting and developing relationships with others. In contrast, Hall and Müller (2004) pointed out the differences with second homes in rural areas where social contact is less frequent due to considerable distances between properties. For instance, whereas second homes in some rural areas in Canada tend to be spatially separated (Wolfe, 1977; Jaakson, 1986), renovated second

homes in Merida's city centre are located one next to the other sharing walls between houses. This suggests neighbours have closer contact when entering and leaving their homes providing transnational second home owners the opportunity to greet and become acquainted with the people who live besides them or along the same street.

Equally important is the role that not-for-profit organizations played in the experience of newcomers, namely *the Bookshelf* and *Les Femmes*. As findings suggested, these organizations provided a welcoming and friendly environment for participants who arrive to the city without any social contacts. Similar to Casado-Diaz's (2009) study, British retirees in Spain recognized the importance of not-for-profit organizations to meet people and make friends. Also, attending social events and informal get-togethers represented another way to socialize with others.

Hence, participants in this study were exposed to various opportunities for interacting and connecting with different types of residents. In this way, the proximity of houses, the presence of not-for-profit organizations, and informal social gatherings helped international second home owners to meet others in the city. In many cases, and as it is described below, these opportunities were the starting point for developing relationships.

#### ***5.1.4 Aspects of relationship building***

Relationships were essential to the participants' lives at the second home destination. In particular, having an open personality and willingness to relate with others facilitated the creation of social relations in the city. Moreover, sharing commonalities, investing time, and carefully selecting friends were significant elements for building relationships with others. Further, participants emphasized the strength of the relationships they have developed in Merida compared to the ones back home. Granovetter (1977) explained that *social ties* present different degrees of strength namely weak, strong, or absent. This strength results from "a combination of

the amount of time, the emotional intensity, the intimacy (mutual confiding), and the reciprocal services which characterize the tie” (p.1361). Indeed, social ties among international second home owners in this study involved many nuances of strength. It is important to make a distinction of the relationships built among temporary and permanent residents. The former group admitted that they have created strong ties with other foreign residents and fewer contacts among the local population. Alternatively, some permanent residents have developed familial bonds with local inhabitants because of their language skills and possible assimilation of the local culture. In this sense, three main types of relationships built by international second home owners can be distinguished: those with other foreign English speakers, those with locals who speak English, and those with local inhabitants when participants were able to communicate in Spanish. Consequently, temporary and permanent residents established multiple relationships at the second home destination that depended on individual choices, length of time spent in the city, level of commitment, and integration in the community.

Previous research in the British countryside captured a public concern associated with an increasing number of second homes (Coppock, 1977; Downing & Dower, 1972). Thus, rising costs in property prices, perceptions of invasion, displacement of residents, and differences in nationalities were seen as sources of tensions between second home owners and local inhabitants (Müller & Hoogendoorn, 2013). However, studies specifically addressing the extent to which international second home owners interact and build relationships with other residents at the host destination are scarce (Buller & Hoggart, 1994; Lipkina & Hall, 2013; Müller, 2002a; Van Noorloos, 2013). The present study has found some similarities with past literature of second homes. For instance, in a study of British second home owners in rural France, Buller and Hoggart (1994) found that the purpose and ability of British residents to integrate in the local

community varied among groups. Some of them did not make necessary efforts to integrate and therefore, have created relationships only with British residents. In contrast, some others showed a “genuine” interest to integrate to the local community life. These British residents sought to be accepted in the local community and have built connections with the French people. In another study, Van Noorlos (2013) made a distinction of the social networks created by foreign residents in a Costa Rican village. Most of the participants admitted to have greater connections with people from their home country rather than Costa Ricans or people from other countries. Moreover, integration into compatriot networks was facilitated by a great amount of foreigners living in the area, the introduction of gated communities, and the spatial segregation between neighbourhoods.

In sum, this study adds to the second home literature by providing a deeper understanding of the ways international second home owners connect and build multiple relationships in the community with local inhabitants and other foreigners living in the city. Regardless of the number of possibilities participants had for creating social relations, several barriers hindered the development of relationships among residents. These difficulties are expanded in the next section.

## **5.2 Challenges to social interactions and relationships**

Researchers had recorded some challenges experienced by international residents at different second home destinations (Buller & Hoggart, 1994; Lipkina & Hall, 2013; Van Noorloos, 2013). However, difficulties of integration, adaption, and socialization are extensively documented on International Retirement Migration (IRM) research (Gustafson, 2001; Innes, 2009; Stokes, 1990; Truly, 2002; Wong & Musa, 2015a). Hence, this section draws upon literature of second homes and IRM to discuss the main difficulties of international residents

found in this study and offer support to insights from past research. The following sub-sections are discussed: language limitations, cultural differences, and tensions among foreigners.

### ***5.2.1 Language limitations***

The lack of Spanish skills represented the most significant challenge for participants to interact and connect with the local people. Findings revealed that everyday interactions with neighbours or local employees were difficult, for example, when purchasing goods, obtaining services, or getting assistance with various procedures. As for the acquisition of second homes and housing related issues, some participants relied on real estate companies or property management firms to deal with services such as water, maintenance, electricity, etc. In contrast, other participants managed to solve problems by themselves using their basic language skills or finding English speakers among the local population.

Also, the inability to communicate fluently in Spanish was considered an obstacle to build relationships with locals. Many participants pointed out their frustration over the lack of Spanish to make Mexican friends. Although their opinion about the local people was highly positive, participants lamented the fact that language hindered the creation of closer relationships with them. In most cases, they acknowledged the need to learn Spanish to be able to communicate and relate. Some participants commented on their intentions and strategies to learn the language such as taking Spanish courses back home, using online platforms and websites, attending the language exchange program at *the Bookshelf*, reading the local newspaper or listening to conversations in Spanish. Despite these attempts, language barriers still challenge participants in their daily lives and construction of social relations with the local people.

Communicating in the local language has been recorded as a barrier in several second home studies (Buller & Hoggart, 1994; Lipkina & Hall, 2013; Müller, 2002b). For instance,

Russian second home owners in rural Finland admitted having little contact with the local residents due to language differences (Lipkina & Hall, 2013). Moreover, findings of this study correlate with studies of International Retirement Migration (IRM) where language is a major barrier for integration in the local community (Casado-Diaz, 2009; Howard, 2008; Wong & Musa, 2015a). Particularly in Mexico, American retirees living in different communities are unable to communicate efficiently in the language (Bloom, 2006; Dixon et al., 2006; Rojas et al., 2014). But even if many of them reside full time in the country, the lack of knowledge in Spanish presented difficulties when interacting with others and while adapting to the Mexican culture. In some cases, permanent residents in the present study were fluent in Spanish and therefore, have built relationships with locals including their families and friends. Besides language limitations, differences in culture also affected the ways transnational second home owners developed social relations with others as it is explained below.

### ***5.2.2 Cultural differences***

Distinctions in culture and behaviors affected the participants' relations with the local people. Results showed that the most salient aspect of culture was the value Mexicans placed on families. In many cases, locals rejected invitations or broke commitments previously made with participants for family reasons. Thus, feelings of astonishment, frustration, and sometimes disappointment arose among participants. As Mexicans are very attached to their kin, families have priority over others. However, participants viewed it differently since accepting an invitation or attending a prior arrangement was very important for them in their relationships. Hence, participants recognized difficulties in adjusting to the culture and local customs and the fact that "family comes first" to the local people.

Cultural distinctions between second home owners and local residents have been noted in second home literature. In rural Wales, Coppock (1977) reported a public concern from an apparent “loss of community” and threat to the Welsh language and local culture as a result of a growing number of second homes. However, in other countries, second home ownership has not presented significant cultural clashes. For instance, Rye (2011) found that local residents in Norway welcomed and accepted second home owners as social and cultural proximity existed among groups. In contrast, Hay and Visser (2014) captured the socio-cultural differences between second home owners and local inhabitants in a small town in eastern South Africa. One of the major differences was the traditional and conservative norms of the local farmers compared to the urban lifestyles and materialism displayed by some second home owners. These distinctions clashed with the locals’ ways of living and affected the perception of second home development in the area. Finally, in a study of International Migration in Mexico, Rojas *et al.* (2014) found that adaption of American retirees in two Mexican communities was hindered by several factors including cultural differences. Similar to this study, some participants commented that family always comes first for Mexicans. Thus, distinctions of culture and values impacted the relationship between international second home owners and the local people at the host community as shown in the results. Moreover, differences among groups of foreigners added to the complexity of the relationships in the city. In the next sub-section, I explain the negative opinions about other foreign residents in the city.

### ***5.2.3 Tensions among foreigners***

Throughout the interviews, participants described several sources of tension that emerged while interacting with other foreigners living in Merida. Differences related to behaviours, attitudes, and opinions caused disapproval and disagreement. Notably, participants pointed out

their fatigue about hearing constant complaints about local services, construction works, unbearable weather, and local cuisine from other foreigners. When newcomers arrive to the city, they experience differences in terms of quality of services and contrasting lifestyles compared to their countries. This contrast between home country and new destination urges second home owners to express their dissatisfaction and frustration over different situations. However, repetition of the same topic became boring and tiring to others. In many cases, participants expressed the need to avoid these kinds of conversations and people at all costs. Another aspect that created tension was the attitudes of some foreigners towards the local culture and people. As many of them did not speak Spanish, they tended to socialize mainly with other English speakers. This lack of integration into the local community was negatively perceived by some participants. As expressed in the interviews, foreigners who only socialize among themselves show no interest to neither learn Spanish nor adapt to the Mexican culture. Additionally, distinctions of motivations and length of stay in the city also created tensions between temporary and permanent residents in the city. While the former visitors spend shorter periods of time for recreation purposes, the later live full time at the location affecting the ways foreigners relate with each other.

Tensions among foreign residents at the second home destination have also been discussed in second home research. Parallel to this study, Buller and Boggart (1994) found that many British home owners living in French rural communities disliked their compatriots. There was a distinction of social categories differentiating those who socialized with other British nationals from those who related with French residents. The first group was referred to as 'poor integrators' as they did not demonstrate interest to integrate into the local community. In another study conducted in Progreso, Mexico, Ancona- Coba (2015) reported that most of the negative

attitudes North Americans immigrants had were towards other foreigners living in the area. These immigrants criticized diverse behaviours displayed by foreigners, refusal to learn Spanish, and attitudes towards the local people and other residents. These results aligned with the present study regarding the tensions existent among foreign residents living in Mexico. Particularly in Yucatan, since both the city of Merida and the port of Progreso are located in the same state.

Besides encountering challenges at the second home destination, participants were benefiting from the social networks they have created in the city as well as helping the community in several ways. The following section discusses the types of social capital generated by participants.

### **5.3 Social capital generation**

The concept of social capital has been recently applied in the context of second home ownership (Huijbens, 2012; Gallent, 2014). The present study sought to contribute to our knowledge by examining the social networks of transnational second home owners in Merida with a social capital framework. Based on Woolcock's (2003) distinction of social capital presented in the literature review, two perspectives informed the organization of this section: the resources and the civic approach. The resources approach focuses on the profits obtained by individuals through social networks (Bourdieu, 1986) and the civic approach considers the collective character of the benefits perceived in communities and societies (Putnam, 2000). These ideas are discussed in the following sub-sections: access to resources at an individual level and benefits extended to the community.

#### ***5.3.1 Access to resources at an individual level***

Almost all study participants emphasized the value of their social networks in the city. They agreed upon the need to connect with others and build relationships. During the data

analysis, it became apparent that participants were accessing resources through their social networks in Merida. As Warr (2006) suggested, there should be a distinction between social support and social capital. The former “refers to practical, emotional, and other forms of assistance and care that people draw on to ‘get by’. Social support eases everyday life, assists families to get over the hurdle of minor upsets, and is probably critical for coping with life’s catastrophes” (as cited in Mulcahy, Parry & Glover, 2010, p. 5). Aligned with this idea, participants in this study received social support including help on practical things, understanding of the city life, and emotional support in difficult times. When participants are new in the city, they are looking for assistance in different ways such as getting information, services and more importantly, knowing people. Many participants pointed out the importance that networking played in their lives, for example, when developing their local contacts or having recommendations by people that later on helped them in various circumstances. Moreover, emotional support was highly valued among participants. As being far away from home may bring feelings of solitude, depression or even sadness, finding reliable contacts might help overcome unexpected situations. Hence, participants in this study were receiving social support (Warr, 2006) through caring friendships which have made a real difference in their experience as international second home owners in the city.

According to Glover *et al.* (2005), social connections among individuals enable the opportunity for accessing resources. This was true for some participants who received assistance for their personal needs and goals. In this way, findings of this study shared the tenets of the resources approach of social capital where the benefits obtained are for one’s objectives (Bourdieu, 1986). Also, participants emphasized how friendships have improved their experience while living in the city. Nonetheless, the types of social networks built in the city enabled them

access to different resources. In fact, transnational second home owners who had contacts among the local population could 'get ahead' in other situations. For instance, getting connections in the local medical system helped one participant to get access to a wider network of doctors. Also, establishing good relationships with her neighbours was for another participant very useful to fulfill a professional goal like publishing a book. Hence, receiving help from others in different circumstances depended on relating with different groups of people and maintaining those relationships over time. It can be said that these outcomes align with the resources approach of social capital in terms of the resources obtained individually through the construction of social networks.

Clearly, participants valued the social connections they have created with other residents and acknowledged that without their expertise and advice their life in the city would have not been the same. In comparing this study with Gallent's (2015) findings in Italy, some differences can be noted. While second home owners in Sardinia built relationships mainly with family or friends, the results in the present study suggested that participants are creating social networks with other residents including foreign and local inhabitants. Also, connections to the neighbourhood in the island were limited. Even if these second home owners were exerting pressure on local services and planning issues, they were acting for their own private interests rather than the community as a whole. In contrast to the present study where some international second home owners had created connections with their neighbours in the same street or in others areas nearby. In some cases, these connections have allowed them social support and access to resources. In the next sub-section, the civic approach of social capital is illustrated with examples on how participants in the present study were contributing the community.

### 5.3.2 *Benefits extended to the community*

Lin (2001) suggested that investment in social relations can bring profits to the individual as well as society. From a collective perspective, social capital is generated through social exchange between individuals who act in favour to the community (Putnam, 2000). This means that benefits are transcending closed networks and therefore, extending to other members in society. Many participants in this study expressed the need to give back to the community as a way to express their gratitude and generosity. In particular, volunteering in different not-for-profit organizations or through informal projects constituted channels for helping others in the city. There were two organizations participants mentioned in almost all interviews: *The Bookshelf* and *Les Femmes*. These organizations - established by English speakers - attract a large number of foreign residents living in Merida who become members, work as volunteers, or attend social gatherings. There are a number of programs, activities and events where both locals and foreigners can participate. Also, activities such as giving free English courses or donating clothes mentioned by participants were means to contribute to the community.

For newcomers, belonging to organizations served for a two-fold purpose: expanding their social networks and helping the community in several ways. As observed in studies of International Retirement Migration, retirees were also involved in volunteer organizations or charitable giving (Banks, 2004; Casado-Díaz, Kaiser, & Warnes, 2004; Haas, 2013; Kiy & McEnany, 2010; Rojas et al., 2014). Parallel to this study, Banks (2004) found that almost all of the American and Canadian retirees living in the region of Lake Chapala, Mexico performed some kind of volunteer work. Many of them devoted a few hours per week in different programs in arts, civic, or philanthropic organizations. As Casado-Díaz (2009) pointed out, social capital involves *active participation* and *strong commitment* (p. 94). Thus, frequent social interactions in

organizations might lead to a constant accumulation of social capital beneficial for the community. Contrary to Van Noorloos' (2013) findings in Costa Rica where temporary residents were less involved in the community than permanent residents; most of the temporary residents living in Merida belonged to organizations or participated in other forms of charitable giving. Even if some participants were staying temporarily in the city, they tried to help the local people. This means that length of stay did not influence the participants' desire to help others. As Putnam (2000) suggested, voluntary associations are key places for the production of social capital (as cited in Glover & Hemigway, 2005, p. 393). In this sense, *the Bookshelf* and *Les Femmes* in Merida constituted spaces where participants helped others, and at the same time, created social connections with other foreign residents and local people. Through participation in activities and transfer of knowledge and skills, international second home owners were enabling the production of social capital in Merida.

#### **5.4 Conclusion**

This chapter presented the complex and multiple social connections international second home owners created in the city of Merida. The discussion of the study findings covered three topics: multiple connections to the city, challenges with relationship building, and social capital generation. As for the connections with others, results suggested that participants were building social relations with different types of residents being foreigners or local inhabitants. These relationships varied in degree and quality showing that connections with other people are happening in the city. On the other hand, transnational second home owners faced difficulties for creating social relations with other residents. In particular, respondents struggled with language and cultural differences that affected social interactions and the possibility to form friendships with the local people. These findings were consistent with research on second homes and IRM

since foreign retirees also presented the same difficulties for interacting and adapting to the host community. Finally, this study offered new understandings on the notion of social capital by using Woolcock's (2003) distinction of the resources and civic approaches aligned with second home ownership. The results revealed that transnational second home owners were acquiring benefits through their networks of local or foreign residents developed in the city. Moreover, their participation in volunteer organizations contributed to the accumulation of social capital in terms of the profits extended to the community. To conclude this research study, I present the final comments, practical recommendations, and future research in the next and last chapter.

## CHAPTER 6: CONCLUDING REMARKS

The present study sought to explore the social connections of international second home owners in the city of Merida, Mexico. The research questions guiding this study aimed to uncover aspects of relationship building, barriers and limitations, and social capital generation. Semi-structured interviews served to collect experiences of individuals and couples living temporarily or permanently in the city. Using coding in grounded theory (Charmaz, 2006), the data collected were analyzed and categorized into themes. Three overarching themes emerged during the analysis of the data: connecting with others, encountering challenges, and accumulating social capital. The outcomes of this study showed the intricate social networks participants develop at the second home destination.

The purpose of this chapter is to offer concluding comments of the study findings, practical recommendations as well as to consider limitations and areas for future research. As previously noted in the discussion section, social connections are an essential component of the transnational second home owner experience in the host community. Connections with others included pre-existing ties to the city, meeting new people, and building relationships. Prior acquiring a second home, motivations and social contacts already in the city influenced the decision for choosing Merida as a holiday, investment, or retirement destination. Moreover, meeting new people was facilitated by social proximity in the neighbourhood and various spaces for interaction with others. Further, the process of relationship building consisted of sharing similarities, choosing friends, and maintaining relationships. The main conclusions that can be drawn for this first theme is that participants are creating relationships with multiple residents regardless of the length of time they spent in the city.

Secondly, challenges at the second home destination have a considerable impact in the way participants build social connections. The main difficulties were language barriers, cultural differences, and tensions among foreigners. The most limiting aspect for interacting with the local people was the inability to communicate in the local language. Also, differences in culture and values created discomfort and frustration to participants. Finally, behaviours and attitudes of other foreign residents caused disapproval and disagreement. The lessons learned of this theme, with respect to challenges for relationship building, are that social integration in the community in terms of connections with the local population depended mostly on language. Foreign residents who were unable to speak Spanish formed their own sub-groups of English speakers. Moreover, negative opinions and impressions of others foreigners created divisions within the foreign community. There was a distinction of those who socialize mainly with other foreigners from those who try to make friends with the local inhabitants. These differences among groups had a significant effect on the ways they related to each other or kept away from each other.

Last, generation of social capital in the city occurs in two forms. At the individual level, participants obtained practical assistance and emotional support that allowed them to 'get by' in different situations in the city. Also, participants could 'get ahead' and succeed in other circumstances as a result of multiple social networks developed among residents. In a collective level, the profits extended to the community through diverse types of volunteering. Sociability and participation in activities played a key role in accumulating social capital. Also, the diversity of social networks developed in the city can give access to different types of resources. It can be concluded that building relationships with local residents can be more advantageous than relying mainly on social connections among the foreign community. Finally, engagement in volunteer

associations can enable social capital for both the individuals and the community since recruitment into organizations was mobilized through social networks.

## **6.1 Practical recommendations**

This study provided relevant insights into the experiences of transnational second home owners in the city of Merida. Particularly, the social connections they establish with other residents at the second home destination. In a practical context, several recommendations arise from the study findings. These recommendations are offered for transnational second home owners as well as the local authorities involved in the city's second home development. As for the former, active participation in social groups might help foreign owners to connect with locals and other types of residents. This could be done through getting involved with local organizations, associations, and groups apart from the usual English-speaking structures. Also, engagement in local events, activities, and festivities in Merida could present opportunities to approach the local people, and to better understand culture, traditions and the country. Moreover, substantial efforts to learn the language should be done so that foreign residents could better integrate and adapt into the community as well as building relationships with locals. Overall, transnational second home owners need to be aware that relying only on foreign networks restrict their possibilities to socialize and become part of the community they live in.

Additionally, there are some recommendations for the government and local authorities. An assessment of the needs and aspirations of foreign owners should be taken into consideration. For instance, the creation of institutions and facilities to welcome and help potential and current foreign second home owners is needed. These places could serve as a way to introduce newcomers into the local culture, language, and activities available to them so that they could have a better and faster integration in the community. If the government wants to promote the

city as a second home and retirement destination, services and amenities for the international visitors should be improved. Moreover, local authorities should carry on censuses to determine the actual number of properties used as second homes as well as the number of foreign residents living in the city. This could be useful for planning and policy regulations of the distribution of second homes. If there are areas where the concentration of second homes is higher, new regulations might restrict foreign buyers to take control of the market and instead, relocate them separately. In this sense, authorities might prevent potential conflicts and disputes among residents because of a larger presence of foreign residents in specific areas. The role of the government and local authorities is crucial to control and prevent some of the negative impacts of second homes and ensure a pacific coexistence among residents.

## **6.2 Limitations and areas for future research**

After carrying out this research study, there were some limitations that need to be noted. One of the most important relates to the time spent on the field. Due to a delay in the submission and ethics clearance of the project, the allocated time for conducting interviews in Mexico was restricted to four weeks. Initially, I also wanted to interview both transnational second home owners and local inhabitants. However, finding potential candidates and conducting the actual interviews with foreigners took longer than I expected and therefore, I could not interview the local people. My intention was to know the opinion from the local people about the presence of second home owners in the city and whether or not they were building social relations with them. Moreover, my intention was to have a balanced response rate of temporary and permanent residents living in the city. But as the interviews were conducted in late March and beginning of April, most of the snowbirds have already left the city. This presented challenges in terms of finding seasonal migrants to be part of the study since they usually stay during the winter months

in Merida (from December to March approximately). Nonetheless, using snowball sampling was helpful to recruit additional candidates from among participants' acquaintances and friends. However, this sampling technique had also limitations as the majority of participants came from Canada, the United States, and the United Kingdom. Even though one of the requirements was to recruit English speakers, covering a larger population from other nationalities could have nurture the study with different views. This could have given another perspective of the second home phenomenon in the city or could also have reinforced the findings of the present study, as participants might have similar experiences on the second home ownership regardless of their nationalities and backgrounds.

Regarding the methods used for data collection, limitations were also present. As semi-structured interviews were the main method for gathering the information, I am aware that employing other techniques could have enriched the study findings. For example, I initially considered conducting observations in the recruitment site but these only focused on the social interactions happening inside the place at specific times while ignoring the multiple interactions and encounters of transnational second home owners around the city. So when I realized this, I decided not to include these observations as they did not reflect the larger picture of transnational second home ownership in other places and circumstances in Merida. Additionally, I intended to organize focus groups with the participants after concluding the interviews, so that they were able to discuss the preliminary findings and verify the accuracy of my interpretations of the data. But as the time on the field came to an end, I was not able to carry on this strategy. This could have provided clarification of my interpretations providing participants an opportunity to meet and discuss with other respondents their experiences on second home ownership. Instead, I used another strategy to verify the participants' responses when I was back in Canada. I sent them an

e-mail with the summary draft of findings requesting additional comments of my interpretations. These ideas and comments served to elucidate information and enhance the study findings.

Some of the limitations of this study can also be seen as opportunities to conduct future research. Further studies are needed on the local residents' perspective of the second home phenomenon. Hearing their voices can uncover aspects of the relationship from both sides as well as the perception of conflicts, tensions, and opinions about the presence of second home owners in the city. In this way, it would be interesting to explore the locals' interest to create and build social connections with foreign residents including the quality and degree of those relationships. If transnational second home owners in this study felt welcomed and accepted by the local community, knowing what the local people think the other way around can offer different insights of the phenomenon in Merida. Moreover, questions should be added in relation to the benefits perceived by the local community through not-for-profit associations, charity groups, or other types of donations. Whether locals know that foreigners are involved in those organizations and the ways they are actually benefiting.

Another opportunity for research relates to the inclusion of participants from different countries since varied backgrounds and cultures could provide more nuances of the second home experience. Understanding the phenomenon from diverse perspectives can be challenging but also very enriching. In addition to that, other groups of population such as participants currently employed could be included, different from to the present study which consisted mostly of retirees. Yet another opportunity might be investigating the phenomenon in areas where the concentration of second homes is lower. For instance, the selection of second home owners who live outside of specific neighbourhoods in the city centre with a higher presence of foreigners

could bring new understandings into motivations, social relations, and integration into the local community.

### **6.3 Conclusion**

The present study explored the international dimension of second homes from the owner's perspective at the host community. This study offers new insights on the second home phenomenon in an urban context contrary to the rural areas mostly found in research (Coppock, 1977; Gallent & Twedwr-Jones, 2000; Müller, 2011; Paris, 2014). Also, the outcomes contribute to the second home literature in Mexico where the phenomenon has not received much attention. Hence, this study adds to the academic literature in three topics: international second homes, urban second homes, and second homes in Mexico.

Additionally, this study contributes to our understanding of the second home phenomenon in relation to the concept of social capital. Early second home research discussed the negative impacts apparently brought by second homes in rural communities (Coppock, 1977; Gallent & Twedwr-Jones, 2000). On the other hand, Gallent (2014) has recognized the significant value that second homes might represent to the local communities. In particular, the role that second home owners could play in transferring knowledge and skills to the local people (*ibis.*). Hence, the present study has highlighted some of the ways participants were accessing resources and contributing to the community through engagement in volunteer associations and informal projects. Indeed, helping others represented a meaningful part of the international second home owners' experience in the city. As in words of one participant: "It is my way of giving back because Mexico is giving me so much".

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## APPENDICES

### Appendix 1: Organization recruitment letter and permission form

#### Organization recruitment letter

Dear [name of the organization]:

My name is Laura Elizabeth Aguilar Mendez. This letter is an invitation to consider participating in a project I am conducting as part of my Master's degree in the Department of Recreation and Leisure Studies at the University of Waterloo, Canada, under the supervision of Dr. Heather Mair. I am interested in exploring the interactions happening between local residents and international visitors who temporarily live in Merida in an owned or rented property for vacations or recreation purposes.

It is my hope to connect with people who are part of the activities and programs at the organization. During the course of this study, I will be conducting observations and interviews to gather stories of encounters, interaction and relationships from both perspectives. To respect the privacy and rights of the organization and its participants, I will not be asking you to contact them directly. What I intend to do is to attend different activities at the location and informally invite people to be part of the study. If a person is interested in participating, I will provide my contact details to further discuss details about the study.

Participation is completely voluntary. Each participant will make their own independent decision as to whether or not they would like to be involved. All participants will be informed and reminded of their rights to participate or withdraw before any interview, or at any time in the study. Additionally, they will receive an information letter including detailed information about this study as well as informed consent forms. All information participants provide is considered completely confidential. To support the findings of this study, quotations and excerpts from the stories will be used labelled with pseudonyms to protect the identity of the participants. Names of participants will not appear in the thesis or reports resulting from this study.

If you wish the identity of the organization to remain confidential, a pseudonym will be given instead. While in Mexico, all paper field notes will be kept in a locked drawer in my room. Digital files will be encrypted and stored on a password protected lap-top. Data collected from this study will be retained locked in my supervisor's office and in a secure cabinet in the Recreation and Leisure Studies department at the University of Waterloo, Canada. All paper notes will be confidentially destroyed after three years. Finally, only myself and my advisor, Dr. Heather Mair of the Recreation and Leisure Studies department at the University of Waterloo will have access to these materials. There are no known or anticipated risks to participants in this study.

I would like to assure you that this study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee. However, the final decision about participation belongs to the organization and the participants. If you have any comments or concerns with this study, please feel free to contact Dr. Maureen Nummelin, the Director, Office of Research Ethics at (+1) 519-888-4567 ext. 36005 or [maureen.nummelin@uwaterloo.ca](mailto:maureen.nummelin@uwaterloo.ca).

If you have any questions regarding this study or would like additional information to assist you in reaching a decision about participation, please contact me at my mobile phone (+52) 999-593-15-68 or by email [leaguila@uwaterloo.ca](mailto:leaguila@uwaterloo.ca). You may also contact my supervisor Dr. Heather Mair at (+1) 519-888-45-67 ex. 35917 or by email [hmair@uwaterloo.ca](mailto:hmair@uwaterloo.ca).

I am looking forward to speaking with you and thank you in advance for your assistance with this project.

Yours sincerely,

Laura Elizabeth Aguilar Mendez  
MA Candidate  
Department of Recreation and Leisure Studies  
University of Waterloo  
(+52) 999-593-15-68, [leaguila@uwaterloo.ca](mailto:leaguila@uwaterloo.ca)

### **Organization permission form**

We have read the information presented in the information letter about a study being conducted by Laura Elizabeth Aguilar Mendez of the Department of Recreation and Leisure Studies at the University of Waterloo in Ontario, Canada, under the supervision of Dr. Heather Mair. We have had the opportunity to ask any questions related to this study, to receive satisfactory answers to our questions, and any additional details we wanted.

We are aware that the name of our organization will only be used in the thesis or any publications that comes from the research with our permission.

We were informed that this organization may withdraw from assistance with the project at any time. We were informed that study participants may withdraw from participation at any time without penalty by advising the researcher.

We have been informed this project has been reviewed by and received ethics clearance through a University of Waterloo Research Ethics Committee and that questions we have about the study may be directed to Laura Elizabeth Aguilar Mendez at (+52) 999-593-15-68 or by email

leaguila@uwaterloo.ca and Dr. Heather Mair at (+1) 519-888-45-67 ex. 35917 or by email hmail@uwaterloo.ca.

We were informed that if we have any comments or concerns with in this study, we may also contact the Director, Office of Research Ethics at (+1) 519-888-45-67 ext. 36005.

Laura Elizabeth Aguilar Mendez  
MA Candidate  
Department of Recreation and Leisure Studies  
University of Waterloo  
(+52) 999-593-15-68, [leaguila@uwaterloo.ca](mailto:leaguila@uwaterloo.ca)

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Associate Professor  
Department of Recreation and Leisure Studies  
University of Waterloo  
(+1) 519-888-45-67 ext. 35917, [hmail@uwaterloo.ca](mailto:hmail@uwaterloo.ca)

We agree to allow the researcher to recruit participants for this study from among the people who participate in the activities and programs at the [name of the organization].

YES  NO

We agree to the use of the name of the organization in any thesis or publication that comes of this research.

YES  NO

If NO, a pseudonym will be used to protect the identity of the organization.

Director Name: \_\_\_\_\_ (Please print)

Director Signature: \_\_\_\_\_

Board of Directors Representative Name: \_\_\_\_\_ (Please print)

Board of Directors Representative Signature: \_\_\_\_\_

Witness Name: \_\_\_\_\_ (Please print)

Witness Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## **Appendix 2: Recruitment script**

Hello, my name is Laura Elizabeth Aguilar Mendez, a Master student from the University of Waterloo in Canada. I am now working on a research project about the relationship between the local residents and international visitors who temporarily live in Merida in an owned or rented property for vacations or recreation purposes.

I am looking for participants to take part in one interview of approximately 45 minutes in length in a mutually agreed location. Some of the topics to be included are relationships, encounters, and interactions with others. Would you be interested in participating?

Foreigners: do you live in Merida temporarily or permanently? If temporarily, do you own or rent a property in the city to spend your vacations? Would you like to share your experience about your interaction with the local people? If yes, hand in information letter to read or read it myself.

Locals: Do you live in Merida or nearby areas? How is the contact you have with foreign people? Do you have contact with internationals who you know are temporarily living in the city in a vacation home? Would you like to share stories of your interaction with them? If yes, hand in information letter to read or read it myself.

This project has been reviewed by and received ethics clearance through a University of Waterloo Research Ethics Committee. Your participation is voluntary and it can end at anytime if you do not feel comfortable. I would like to give you my contact details if you would like to be part of it. Thank you for your time and I look forward to hearing your stories.

## **Appendix 3: Information letter for participants**

### **Information letter**

Dear Participant:

My name is Laura Elizabeth Aguilar Mendez. This letter is an invitation to consider participating in a study I am conducting as part of my Master's degree in the Department of Recreation and Leisure Studies at the University of Waterloo, Canada, under the supervision of Dr. Heather Mair. I am interested in exploring the interactions happening between local residents and international visitors who temporarily live in Merida in an owned or rented property for vacations or recreation purposes.

Over the years, the phenomenon of second homes and the social, economic and environmental impacts associated with its development have mainly centered in rural areas of Europe and North America. More recently, studies have turned to examine these impacts in the underdeveloped world including a more positive view associated with the contribution that second home owners may bring to their host community. Nonetheless, second homes and the host-guest relationships in Mexico have been understudied. For this reason, the proposed study aims to provide greater insight of the phenomenon while considering the social interactions that take place within the city of Merida, Mexico. In this sense, the phenomenon is examined taking into account the international dimension of second homes in an urban setting, adding to the previous studies which focused mostly on rural areas.

Participation in this study is voluntary. If you decide to participate in my research, you will be asked to take part in one interview of approximate 45 minutes in length in a mutually agreed upon location. You may decline to answer any of the interview questions if you so wish. Further, you may decide to withdraw from this study at any time without any negative consequences by advising the researcher. Examples of the types of questions that will be asked include: How would you describe your relationship with (international visitors/ local residents)? What do you see as the challenges of these encounters? What do you think are the benefits from these interactions? And so on. If you wish, I could give you the interview guide prior having the interview for your review. With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis. Sometime after the interview has been completed, I will provide you with a copy of the transcript to give you an opportunity to confirm the accuracy of our conversation and to add or clarify any points that you wish. All information you provide is considered completely confidential. Your name will not appear in any thesis or report resulting from this study, however, with your permission anonymous quotations may be used. While in Mexico, all paper field notes will be kept in a locked drawer in my room. Digital files will be encrypted and stored on a password protected lap-top. Data collected from this study will be retained for three years in a locked office in my

supervisor's lab. Only researchers associated with this project will have access. There are no known or anticipated risks to you as a participant in this study.

If you have any questions regarding this study, or would like additional information to assist you in reaching a decision about participation, please contact me at (+52) 999-593-15-68 or by email at [leaguila@uwaterloo.ca](mailto:leaguila@uwaterloo.ca). You can also contact my supervisor, Dr. Heather Mair at (+1) 519-888-4567 ext. 35917 or email [hmair@uwaterloo.ca](mailto:hmair@uwaterloo.ca).

I would like to assure you that this study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee. However, the final decision about participation is yours. If you have any comments or concerns resulting from your participation in this study, please contact Dr. Maureen Nummelin in the Office of Research Ethics at (+1) 519-888-4567, ext. 36005 or [maureen.nummelin@uwaterloo.ca](mailto:maureen.nummelin@uwaterloo.ca).

I hope that the results of my study will provide a better understanding of the phenomenon of second homes through the experiences of both locals and internationals living in the city of Merida. For the participants, this study will provide the opportunity for sharing their stories and experiences of interaction with others.

Yours sincerely,

Laura Elizabeth Aguilar Mendez

MA Candidate

Department of Recreation and Leisure Studies

University of Waterloo

(+52) 999-593-15-68, [leaguila@uwaterloo.ca](mailto:leaguila@uwaterloo.ca)

## Appendix 4: Informed consent form

### Informed consent form

By signing this consent form, you are not waiving your legal rights or releasing the investigator(s) or involved institution(s) from their legal and professional responsibilities.

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I have read the information presented in the information letter about the study “Exploring the relationship between transnational second home owners and local residents in the city of Merida, Mexico” being conducted by Laura Elizabeth Aguilar Mendez of the Department of Recreation and Leisure Studies at the University of Waterloo. I have had the opportunity to ask any questions related to this study, to receive satisfactory answers to my questions, and any additional details I wanted.

I am aware that I have the option of allowing my interview to be audio recorded to ensure an accurate recording of my responses.

I am also aware that excerpts from the interview may be included in the thesis and/or publications to come from this research, with the understanding that the quotations will be anonymous.

I was informed that I may withdraw my consent at any time without penalty by advising the researcher.

This project has been reviewed by, and received ethics clearance through a University of Waterloo Research Ethics Committee. I was informed that if I have any comments or concerns resulting from my participation in this study, I may contact the Director, Office of Research Ethics at (+1) 519-888-4567 ext. 36005.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this study.

YES  NO

I agree to have my interview audio recorded.

YES  NO

I agree to the use of anonymous quotations in any thesis or publication that comes of this research.

YES  NO

When the study is completed, would you like to receive a copy of the executive summary?

YES  NO

If yes, please provide me with an email address so that I may send you the Executive Summary.

Email: \_\_\_\_\_

Participant Name: \_\_\_\_\_ (Please print)

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness Name: \_\_\_\_\_ (Please print)

Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **Appendix 5: Interview guide**

Opening speech: *Thank you for agreeing to participate in this study. This interview is meant to be conversational in style. I would like to ask you some questions about your experience living in Merida and the relationships you have in the city. I am also interested in new topics as they arise during our conversation.*

*I would like to remind you that you do not have to answer all of the questions in the interview if you do not feel comfortable. You may choose to end the interview and/or your participation in this study at any moment. In order to have a more accurate account of our conversation today, I will be audio recording our interview. Is this okay with you?*

### **1. Please tell me about the reasons for choosing Merida for living/spending vacations?**

- What motivated you for buying/renting a home here?
  - a. Have you been in the city before buying/renting a home?
  - b. Did you know someone in the city before taking the decision?
  - c. Did someone help you in the process of acquiring the property?

### **2. When did you start spending vacations here?**

- a. How often do you come to Merida?
- b. For how long?

### **3. Tell me about the people you have met in the city.**

- a. How do you get to know people here?
- b. Who do you communicate with on a regular basis?

### **4 Have you met people from your own country?**

- a. Where did you meet them?
- b. How often do you see them? Or go out with them?
- c. What are some of the places you go to? or activities you do with them?

### **5. What can you tell me about your neighbours?**

- a. Do you know them? Are they local or foreign?
- b. How well do you know them?
- c. Do you regularly speak with them? Or hang out with them?

### **6. Tell me more about the local people.**

- a. What difficulties have you experienced while interacting with them?
- b. Do you consider there are any barriers or limitations? If yes, which ones? Examples.
- c. Do you speak Spanish? What is your level of understanding/communicating in the language?

**7. How would you consider your relationship with the locals?**

- a. Do you consider any of them a friend? Or are they more acquaintances?
- b. Where have you met them?
- c. How often do you see them? Go out with them?
- d. How do you think this relationship could be improved? Become closer?

**8. Do you consider it is important to get to know people while you are here?**

- a. If yes, how so? Examples.

**9. In case you need help or when you have a personal problem, to whom do you turn?**

**10. In your own experience, how do you think friendships with people from your same country differ from those with people from Merida?**

**11. What are some of the activities you normally take part in with the locals?**

- a. How often do you participate in them?
- b. Do you attend events held by the “municipio” or the local government?

**12. Tell me some of the interests you share with the locals.**

**13. Are you currently member of any organization or volunteer association in the city?**

- a. If yes, which one?
- b. How did you become interested in getting involved?
- c. Did someone of your friends or people you have met here invited you?
- d. How often do you take part in the activities? (Per week).

**14. Tell me more about your experience at the library.**

- a. Mention some of the reasons about participating in some of the activities.
- b. What programs or events have you attended or currently attend?
- c. How often do you attend?
- d. Have you met any friends there?

**15. What would you consider are the benefits for interacting with the local people?**

- a. What have you learned from them?
- b. What do you think they are learning from you?
- c. Do you feel yourself as part of the community?

**16. When you go back home, do you keep contact with the people you have met here?**

- a. If yes, how? Examples.

**17. Are there any other comments that you would like to add?**

## Appendix 6: Feedback letter

University of Waterloo, Ontario, Canada.

Date:

Dear Participant:

I would like to thank you for your participation in this study entitled “Exploring the relationship between transnational second home owners and local residents in the city of Merida, Mexico”. As a reminder, the purpose of this study is to gain further insight on how the local people and international visitors who own or rent a vacation home interact at their host destination.

The data collected during interviews will contribute to a better understanding of the phenomenon of second homes and the host-guest relationship in the city of Merida, Mexico. Also, it aims to provide the academic community with increased knowledge and possible links with the concept of social capital as beneficial for the communities with the presence of second homes.

Please remember that any data pertaining to you as an individual participant will be kept confidential. Once all the data are collected and analyzed for this project, I plan on sharing this information with the research community through seminars, conferences, presentations, and journal articles. If you are interested in receiving more information regarding the results of this study, or would like a summary of the results, please provide your email address, and when the study is completed, anticipated by [insert date], I will send you the information. In the meantime, if you have any questions about the study or findings, please do not hesitate to contact me or my supervisor Dr. Heather Mair by email or telephone as noted below.

As with all University of Waterloo projects involving human participants, this project was reviewed by, and received ethics clearance through a University of Waterloo Research Ethics Committee. Should you have any comments or concerns resulting from your participation in this study, please contact Dr. Maureen Nummelin, the Director, Office of Research Ethics, at (+1) 519-888-4567, ext. 36005 or email [maureen.nummelin@uwaterloo.ca](mailto:maureen.nummelin@uwaterloo.ca).

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