



Identity narratives by American and Canadian retirees in Mexico

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Abstract. Ethnographic materials, including depth interviews and a video, are analyzed to better understand how expatriate retirees living in the Lake Chapala Riviera region of Jalisco, Mexico manage personal identities in retirement. Using concepts from narrative gerontology, this study demonstrates how expatriates' stories and descriptions of Mexicans and Mexican ways of life reflexively construct storytellers' identities and provide a logic for intercultural relationships. While the host population is characterized as happy, friendly, helpful, enterprising and polite, concurrent stories by the same narrators portray them also as untrustworthy, inaccessible, lazy and incompetent. A discourse analysis that extends Cavarero's narrative identity theory argues that these contrasting conceptions of the host culture and population are deployed so as to reflexively position expatriate retirees as interpersonally attractive, culturally tolerant and pragmatically adaptable. Implications for the subjective experience of international migrant retirees are drawn from the descriptive analysis.

Keywords: Identity, Expatriate retiree, Narrative, Mexico

Introduction

While well-established research in communication scholarship has investigated intergenerational communication and numerous issues in aging and identity, communication scholarship has only recently begun to ask what meanings are associated with retirement and how the retirement experience might be related to communicative behavior. This study links some recent scholarship on aging and identity—in particular research within the ethnography of communication tradition—with studies from other disciplines on the subjective meanings of retirement among international migrant retirees. It examines how narratives told about intercultural others can cultivate and display the personal identities of narrators. Its empirical material is the talk of retired North Americans living in central Mexico, as they describe their relationships with Mexicans. What follows in this section is a review of recent research on expatriate retirees and international retirement migration, a discussion of relevant identity theories and narrative gerontology, and the research questions for this study that were generated by the intersection of these scholarly foci

and my interaction with the intercultural community of expatriate retirees in Mexico.

Expatriate retirees

Most Americans, indeed most retirees throughout the industrialized world, continue to live in the same communities after retirement as they inhabited before retiring (Halfacree, Flowerdew & Johnson, 1992; Longino, 1996; Savishinsky, 2000). A small but significant proportion of retirees relocate for improved amenities, to be near mobile children and grandchildren, and for health, economic and other personal reasons (Haas & Serow 1993; Longino 1996). That proportion of the retired population appears to be stable at between nine and ten percent (Longino, 1995, p. 14). While a much smaller number of retirees—less than one-quarter of one percent—elect to move to a foreign country, some scholars conclude that international retirement migration is a rapidly growing trend, especially in Europe (Gustafson, 2001; Warnes, King, Williams & Patterson, 1999). Currently over 400,000 retired Americans receive their Social Security checks at a location outside the United States (Morgan, 2003).

The experience of expatriate retirees is different from that of other retirees. Often their retirement residence is a greater distance away from family and former social networks than for domestic migrant retirees. This factor makes proximity to an international airport or rail service an important consideration in the relocation decision. Even with the amenity of a nearby international transport hub, the transborder migration results in greatly extended family network ties and increased reliance on long-distance communication and travel.¹

More consequential is the fact that international migrant retirees usually enter both a new set of retirement social roles and relationships and a new—often very different—culture from their former life situation. The dual transitions of retirement and international migration can mean adjusting to new legal systems, new social and interpersonal expectations, and new housing, dietary and public sanitation standards and practices—just at the time the retiree might be fundamentally redefining her or his productive place in society. Unlike domestic migrant retirees, who may choose to participate in public life or not, expatriates are barred from political participation, and in some cases, as in Mexico, can be deported for involvement in even minor criminal offenses or any public demonstration. There is the additional consideration of documenting alien residence status, with sometimes layers of bureaucratic procedures and rules that may constrain retirees' activities. Often expatriate retirees face restrictions on their use or ownership of automobiles, real estate, firearms or other goods of commercial value.

In most cases the host culture has a dominant language that is not the retiree's first language or is one the retiree does not know at all. Language barriers can severely limit retirees' participation in social and cultural activities. Recent research found for British expatriate retirees that "large numbers of immigrants are excluded by impenetrable 'language walls' from all but superficial engagement with the host communities," and these language walls usually lead to enclavism within the expatriate community (King, Warnes & Williams, 1998, p. 105). In addition, language barriers can lead to frustrations and stress when conducting the practical transactions of everyday life, such as paying bills, getting an auto repaired, or obtaining social services. A related study (Warnes et al. 1999) found that individual well-being among expatriate retirees is highly associated with fluency in the local language (also see King & Patterson, 1998; King, Warnes & Williams 2000).

Recently there has been a growing interest in the subjective experience of retirees, with attention turning to issues of identity and personal meaning. In some instances, this interest is grounded in the dynamics of retirement (e.g., Savishinsky, 2000). Ekerdt and DeViney (1993) argue that "retirement is more than just a labor supply decision; it signifies withdrawal from the major adult role of worker, and it portends a change in self-identity" (p. S36). Other studies have explored gender identities among retirees (Gray, Fitch, Fergus, Mykhalovskiy & Church, 2002; Szinovacz & DeViney, 1999), social role identities in retirement communities (Aleman, 2001; Moen, Erickson & Dempster-McClain, 2000), spatiality and identity in late life (McHugh, 2000; Taylor, 2001), and the influence of policy narratives on identities (Biggs, 2001). Identity research is particularly relevant among expatriate retiree populations, because of the dual demands placed on retirees for identity work in the retirement transition while adjusting to life within another culture.

Identity and narrativity

One key access point for the study of identity is the stories people tell, sometimes autobiographical, but also possibly stories about others. Ethnographers of communication have argued that "identities [are] dimensions and outcomes of communicative practices" (Carbaugh 1996, p. 24), and as such communicative action shows who people are that are accountable in particular contexts, and that "one's sense of who one is derives from the particular arrangement of social scenes in which one participates" (p. 25).

To say that identity is "one's sense of who one is" might seem like arguing the obvious; nonetheless, this expression embraces the tradition of theorizing identity that reaches back to William James. James recognized the subjective and objective aspects of selfhood—the "I" and the "me," respectively—and he

argued that the agential I unifies and integrates experience so as to produce a social product, the self-conception of the me. McAdams (1997) points out that the agential I is therefore not a state of being but a process the self undertakes: "The I is rather the process of being a self To self—or to maintain the 'stance' of an I in the world—is to apprehend and appropriate experience as a subject, to grasp phenomenal experience as one's own, as belonging 'to me'" (p. 56). McAdams further argues that the me has no necessary unitary character but is made coherent and cohesive over time by the modernist project of creating a life narrative. From this perspective, "identity is both personal and social" (Ashmore & Jussim 1997, p. 14).

The place of narrative in identity work, however, is more central than McAdams has located it. The selfing process depends on the narrative structure of human experience and sense-making, what Cavarero (2000) calls "the familiar narrative structure of memory" (p. 43). Numerous theorists have argued that humans apprehend, organize and make sense of the phenomenal world as stories (see McAdams 1993, 1997). On this point, Freeman (1988) has written: "[I]t is difficult to conceive of a mode of experience utterly and entirely shorn of narrative. In part, I would argue . . . this is because the phenomenology of human temporality requires it as a condition of the very intelligibility of experience" (p. 457).

Moving beyond the interpretative nature of the I, narrativity is for many theorists the fundamental performative mode of human social being (e.g., Cohler, 1993; Fisher, 1987; Gubrium, 2001; Randall, 1995), with Nussbaum and Coupland (1995) supporting this view by arguing that "perhaps the strongest tide of discursive research on aging is narrative analysis" (p. 75). Storytelling and its analysis has been found to be so powerful a tool that the new research and therapeutic genre of narrative gerontology has gained legitimacy (Kenyon, Clark & deVries, 2001). Narrative gerontology, as summarized by Kenyon and Randall (2001) "explores the various ways in which stories function in our lives, as well as how we ourselves function as stories" (p. 3).

Within this narrative gerontology framework, the insights of Cavarero can be applied to bring speakers and others together in a lifespan system that produces situated identities. Cavarero (2000) argues that it is not just the stories we tell about ourselves that constitute our identities; rather, it is the stories others tell about us, from birth to death, that inform us of not only what kind of object we are also, but what kind of person we may be. This element of identity work she calls "the narratable self," and she emphasizes the political nature of coming to selfhood through presenting a narratable self to the world and receiving assessments and legitimations from "the necessary other" (p. 81 et. seq.). I am interested in extending this innovative argument by demonstrating that persons also altercast—as they characterize, describe,

and position—others in their (inter)cultural scenes for the purpose of making themselves recognizable as particular sorts of persons. In other words, because each discursive act entails both a negotiation of participants' character, alignments and assertion of rights to speak as one does so, the stories we tell about others simultaneously and implicatively tell a story about ourselves. In this sense a narratable other may be expected to provide either an affiliational or differentiated role and thus a textured social order for our own stories to be constructed and known: A necessary self is possible only through the recognition of and engagement with a narratable other.

Research questions

With this theoretical framework in mind, this project invites three broad research questions. In examining expatriate retirees' narratives about Mexicans, first, *How are Mexicans characterized as persons in the discourse of expatriate retirees living in Mexico's Lake Chapala Riviera?* The second question follows on and interrogates the answers to the first question: *How can these portrayals and evaluations of Mexicans be interpreted to implicate the storyteller as a certain sort of person?* In other words, this approach to the stories of expatriate retirees about Mexicans is to understand what the culture of expatriate retirees in this community constructs as ways of regarding Mexicans, and then to analyze those constructions to argue for what they say about the self-construals of those who are storytellers. Finally, in discussion section, the question, *How do these identity construals contribute to a fuller understanding of the expatriate retiree experience in this intercultural community?* is responded to.

Method

Setting

During October and November 2002, I lived as a self-proclaimed retirement researcher among international migrant retirees at Lake Chapala in the state of Jalisco, Mexico. I returned to that community in November of 2003 for further interviews and observations. That field work followed previous, shorter visits to Cuernavaca, Puerto Vallarta, and Pátzcuaro, which have small to substantial expatriate communities. The towns of Chapala, San Antonio Tlalyacapan, Ajijic, San Juan Cosala, and Jocotepec comprise the "Lake Chapala Riviera" (Truly, 2002), situated along the north shore of the largest natural lake in Mexico. Expatriate residents are more likely to refer to the five municipalities

as simply "Lakeside." An hour's drive south of Guadalajara and at an elevation of about 5,000 feet, Lakeside enjoys one of the world's most desirable climates, relatively (to suburban North American) low cost housing in charming towns and villages, and convenient proximity to a major international airport and metropolitan center.² American expatriates have been migrating to Lake Chapala since early in the 20th century, attracted by the natural beauty of the area, the gathering of artists and bohemians, and the inexpensive living.³ In the last quarter century Canadians have been relocating to the region in increasing numbers, so that now about an equal number of American and Canadian year-round expatriates reside in the five towns. In the last two decades, clusters of gated residential developments called *fraccionamientos* have sprung up, where retirees physically wall themselves off from the outside world and employ gate guards to screen visitors. The lingua franca of commercial and social life in the five communities is English, and most "gringos,"⁴ even those who have lived in the area for a decade or more, speak little or no Spanish. Otero (1997) found that only 12% of migrant Lakeside retirees rated their Spanish as "more or less fluent"; only six percent of participants in this study said their Spanish was good or fluent.

Estimates of the number of resident expatriates vary drastically. Mexican government figures show approximately 5,000 to 6,000 year-round North Americans (*Ayuntamiento de Chapala* 1997, cited in Truly, 2002). The Lake Chapala Society (LCS), a volunteer service and support organization founded in 1955 to assist the international migrant retiree community, has nearly 3,000 members; LCS officials estimate this number represents only about one-quarter of the total international migrant population. Some of the participants in this study claim that over 25,000 international migrant retirees populate the lake's north shore, about a quarter of all residents in the area. What is undisputed, though, is the residents' claim that this is the largest community of retired American and Canadian expatriates in the world.

Participants

The participants in the overall project are mostly expatriate retirees from the United States and Canada; a much smaller number of participants are working expatriates from North America—real estate agents, restaurateurs, hoteliers, lawyers, an Internet café owner—and Mexicans who work in the service economy in the lakeside towns. Included in the participant population are one German national and one French-Swedish couple, although these three had relocated from previous residence in the U.S. Participants were recruited by selective opportunism and by traditional snowball sampling. I sought to enlist persons I encountered in my daily travels over the initial five weeks

of ethnographic field work; if the persons I encountered were part of the permanent expatriate community or were normally engaged with members of that community, I would pursue further contact with them. This criterion eliminated tourists and seasonal visitors. Gatekeepers at LCS and a generous sponsor in the expatriate community helped me initiate the snowball sample.

Data

The data are generated from 26 depth interviews that ranged from one and a half hours to three hours each, 40 informant interviews and over 100 ethnographic interviews; language and visual texts from English and Spanish language newspapers, weeklies and monthlies; a tourism promotional videotape produced by Chapala Realty; maps, menus, posters, fliers and brochures from businesses and volunteer organizations; and field notes based on my participation in community activities. Those activities included LCS functions and meetings, church services and dinners, writers' group meetings, crafts fairs and bazaars, real estate tours, and social gatherings. In the aggregate, all these materials are essential for immersion in and understanding the intercultural scene.

My analysis here focuses on the 26 semi-structured depth interviews, which used the "active" interview technique (see Brenner, 1985; Lindlof & Taylor, 2002), and the commercial videotape. In all but one case, the 25 American and one Canadian interviewees are "retired," in the sense that they no longer are working at a full time occupation to generate primary income. One interviewee left professional employment in the U.S. to run a café and a dinner club in Ajijic. All of my interviewees devote from a few hours to nearly full time each week as volunteers in civic, arts or philanthropic organizations. Their ages range from 45 to 91, but most are between 70 and 85 years old. Most are comfortably well off in retirement, following earlier careers as professional level workers—clinical psychologist, engineer, university professor, sales manager, attorney, military officer, business owner, and government administrator are among the job titles they reported. One 71 year old participant lives on the margins of poverty and homelessness, following a life as a vagabond with occasional employment and periods of hospitalization for various mental and physical problems.

After repeated listenings, pertinent parts of the recorded interviews were transcribed, using commonly applied transcription standards (see Atkinson & Heritage 1984, pp. ix–xvi).⁵ Similarly, I viewed the promotional videotape three times before transcribing and making observational notes about pertinent parts. Field notes and the transcriptions were then subjected to an analytic

induction process of data-reduction to produce a set of categories organized around broad topical themes. To accomplish this data-reduction, I bracketed narrative units that describe Mexicans or Mexican ways of life and in successive waves organized the units into categories based on narrative patterns. Harré and van Langenhove (1999a) argue that the main discursive persona-claiming acts are declarations of how the world appears to the speaker—which may be likened to soliloquys—and narrations, that is, stories in which speakers present themselves and others as particular sorts of characters in a drama. In the following section I present examples of these patterned narratives and analyze the narrative exemplars to interpret what meaning they might hold for the storytellers and intended for hearers. Then I present an account of how retirees' identity work is achieved through the telling of these stories.⁶

Descriptive analysis

The expatriates' narratives present a complex portrayal of Mexicans; nonetheless, there is a high degree of consistency in the characterizations. Mexicans, both generally and individually, are depicted by all participants as being happy, warm and friendly, polite and courteous, helpful, and resourceful. In soliloquies, interviewees explicitly use these adjectives to describe Mexicans in general, and the same qualities are inscribed in stories they tell about specific Mexican people. Here are some examples of soliloquies:

LH Mexicans are very kind.

CE The thing that keeps us here is more than anything we love the climate, but the people enter into it, that's a strong factor, and I find the people to be very gentle, they're very friendly.

RB Everybody's happy in Mexico.

PL I left Mississippi, and that's an angry state. I came down here and found a friendly people and it's stayed that way. They're polite to each other and they're polite to strangers. That's a new experience and one that I really like.

MP Mexicans can make the rundownest things work. They're resourceful, that's for sure.

Toots Masterson told a story about coming to see Mexicans as happy:

TM When I came down here and I saw the gardeners and those bent over with labor and I thought man what is wrong with these people, why don't they get with the program? You know they had hundred two hundred years ahead of us, where they had a civilization as such, and in America we had to start from scratch and, where had they been? Well it didn't take

long maybe six to eight months before I realized oh God how great not to be chasing the dollar bill, how wonderful, and they're playing guitars at the bus stop and they're happy, and I thought maybe it's America that's doing it wrong and this place has a totally different culture.

When asked about relationships with Mexicans, all interviewees readily described Mexicans as friendly and helpful or related anecdotes that included accounts about how friendly and helpful Mexicans are. Stella Eastman told this story:

SE The Mexicans are very friendly. They're warm, you know, and they will go out of their way to help you if you need help, even if they don't know you.

SB M hm. That's something that pleases you for—

SE Uh huh.

SB —for living here?

SE Okay, here we go to walking again. If I cross the street and a car is coming up—if it's a Canadian car I'd better stop ((SB laughs)) or a, or an American car, Canadians are the worst, a Texas car, a lot of people buy their cars in Texas because they can go across the border to renew because it's close and there's no tax sales tax or income taxes—ahm, but if it's a Mexican they will stop as I cross the street. You know, the bus drivers if they see you or even if they don't see you and somebody sees you running after the bus they will stop and wait for you, either if you're coming from behind or in front of the bus.

Friendliness is coupled with a helpful civility in Stella's account and is demonstrated by courtesy and deference to pedestrians. Flora Deutsch typifies Mexican people in her story of a highway incident and a good Samaritan:

SB Tell me about your views about Mexicans. Do you have Mexican friends here at Lakeside?

FD They're ahm they're a very cordial, polite, well-mannered society. They're warm and they're helpful and they will go out of their way if you need something to assist you. Ahm, we broke down one time on the road leading into Uruapan out in the middle of nowhere and we put the hood up and a man in a pickup truck pulled over and and gave us a jump start and then followed us, to make sure that we were okay, and ah the alternator went out again and we coasted to a stop and he turned around and came back, started us again followed us again into town, showed us where to go, waved goodbye, I mean that's typical. So I think the Mexican people are wonderful people.

Mexicans also are consistently portrayed as inaccessible, resentful, untrustworthy, dependent, needy, inept and lazy, as in this soliloquy by Richard Baker:

RB In the United States there are places where people's word is their bond?

SB Oh yeah.

RB Ah here a person's word is their word.

Mexican perfidy is contrasted with American trustworthiness. Every person interviewed had criticisms of Mexicans and Mexican business and governmental practices, as in these examples:

AH You have to just learn they can't get any thing right.

JP Telmex is the big problem. It's impossible to deal with them. They're incompetent and nobody cares.

SW You have to keep after them ((i.e., workers)). You'll find them just sitting around talking doing nothing, they might disappear for days and then show up again.

AG The lake will never come back because they don't care. The government is ruining it, allowing the rich guys up the Lerma and Guadalajara to drain it down, and their pollution, they don't care if it gets polluted, agriculture, tanneries along the Lerma, they don't care.

MF Just try to get a piece of business done that requires a government official to approve it or a notary to do something with it, and you'll see if you can tolerate the delays and problems.

John Gruber responded to a question about the drawbacks to living as an expatriate in Mexico by saying "there's no recourse." That phrase is meant to convey the frustration felt at having to tolerate poor customer service, lax regulatory enforcement and other problems in intercultural consumer and community relationships. His account for the lack of recourse is:

JG they have no competition they have no control that's, it's the, you know the the politicians in the States are not honest ((chuckles)) necessarily, ah but down here they're expected not to be honest.

Most participants who had lived in Mexico for more than a year or two asserted that Mexicans are friendly but cannot be true friends. These more experienced expatriates stated that the failure to achieve close relationships with Mexicans is attributable to Mexicans' exclusivity, which expatriates simply have to tolerate.

FD Everyday Mexicans are nice warm friendly. They're not like American friendly. You know we could be friends and you'd be coming to our house to dinner and blah-blah-blah and it'd take about a week. In Mexico it's not gonna happen, if you're not family you're not gonna get past a certain point. But ((4 second pause)) I'm comfortable with them.

A flat intonational pattern and lack of pausing in Flora Deutsch's articulation of "nice warm friendly" signals that her characterization can be taken as ironic: Mexicans are only superficially friendly, from an American perspective, because they exclude all but family from close relationships. Lettie Holmes acknowledges that there is a superficiality to her friendships with Mexicans, even though she earlier agreed that her live-in servants are like family to her:

LH Lets see now, well I keep making new friends, especially among the Mexicans.

SB You have quite a few Mexican friends?

LH Uh, yeah. It's hard to be that close with a Mexican when you don't ev-, ah, you don't have the same background.

SB M hm.

LH Ah, but I guess my friendships here are a little more ah surface than, than ((long pause))

Richard Baker says the best efforts by expatriates to befriend Mexicans are dashed by Mexican resentments:

RB I know Americans who have been in business and they've hired a Mexican and the Mexican's been like a son to them and they've given him all kinds of privileges and that works up to a point and then there's some resentment or something comes in and then the Mexican begins to take advantage of the Americans and eventually there's a falling out. And you just have to, have to not let that happen.

Most participants similarly said they have Mexican friends. Their descriptions of those friendships, however, are consistently mitigated, like Lettie Holmes's description of her "surface" relationships. Stella Eastman calls her maid Conchita a "good friend," and then describes the evidence for their friendship:

SE You know the girl who helps me clean house, well she and I ha- are are good friends, we've taken some real bus trips together?

SB M hm.

SE The Mexicans an—and San Antonio is a small town, everybody is related to everybody.

SB M hm

SE they're cousins or inlaws or something, but they the little old ladies in their sixties and seventies will put together a tour and it's a religious tour. And they went in buses and they go to ah to ah Mazamitla, they'll go to ah La Manzanilla first and there's a shrine there to the Virgin of Guadalupe, and then they go to Mazamitla or they'll go to Topalca or they'll go to the the ah spring forest outside Guadalajara and then they'll go to Guadalajara to the ah the temple. I mean they take these little religious tours on these buses for about sixty pesos, anywhere from sixty to a hundred and twenty pesos. Last year they took one that was three days and they went to the beach, and you know you you would room with, you know four or five women or couples or whatever, you know you would either buy you know rent your own room and whatever. So I would go on these trips and I would pay Conchita's fare and we would go together, and she'd help me you know figure out where I was going, what was going on, what ((long pause))

SB Well that's good.

SE And my Spanish was nonexistent, I mean I was not speaking Spanish. I mean ah hh I was thrown into the environment so I had to speak a little bit and Conchita would help me, you know correct my Spanish—she understands what I'm saying a lot of times when I don't understand what I'm saying ((chuckles))

Despite intimations of closeness and personal knowledge, the relationship is framed as an instrumental exchange. Stella would hire Conchita to accompany her on tours as a personal tour guide and translator, and she would pay Conchita's trip expenses, an arrangement that parallels their relationship in Stella's home.

This instrumentality is central in stories about sexual relations between Mexican women and male expatriates. In seven separate interviews, eight male interviewees described Mexican women seeking to trade sex for financial gain and security, although it was in no instance characterized as prostitution. Instead, a story of friendship and mutual needs was constructed and retold in similar form in all cases:

JG Let us assume that a scenario that you have a man, he's single, a a widower or whatever, might not be rich but rich is relative down here and he meets up with a young Mexicana who basically lives in the barrio and has no hope of getting really out or a career. She has no education or decent job, she might have a half a dozen kids or so and a husband who might be there might not ((3 second pause)) no hope for anything, meets up with this gringo who's alone and lonely and they have something to offer each

other, which, what's wrong with that? Whether they get married or not she is she is bettering herself than she could've reasonably expect, she is fulfilling his need which is, could be sexual or whatever but he is, they are helping each other. What's wrong with that?

Although this logic of mutual beneficial exchange was consistently applied to rationalize the intercultural sexual relationships, highly animated stories of the "black widow"—a Mexican woman who would fleece vulnerable elderly expatriate men under the guise of entering a romantic relationship with them—circulated among several male coffee klatches and surfaced in interviews. One interviewee asserted that the black widow killed numerous gringo lovers and eventually was caught and prosecuted. Al Gutierrez and Charlie French told a story about another expatriate retiree who had had a series of Mexican girlfriends.

AG Sammie Gold got tangled up with a real black widow, and she took his money and his car, and the cops told him to get away from her, which he eventually did.

CF Yeah, Sammie got thoroughly taken. But you know most Americans here don't understand the social and economic aspects of sexual relations, as it's like some Mexican women pursue more than one gringo to spend time and money on her with a schedule of other gringos doing the same thing, and most people think of that as prostitution, but it's just a necessary way for poor women down here to live.

These brief excerpts display some of the complexities and contradictions in expatriate retirees' soliloquies and stories about Mexicans. The pattern of participant narratives describes Mexicans as friendly yet incapable of being close friends; helpful yet dependent and incompetent; polite yet untrustworthy; happy yet pitifully poor and, in some characterizations, backward. A fuller understanding of these contrasting perspectives and the implications of these narratives for expatriate retirees' identity work can be achieved through examining how the the expatriates' discourse constructs and displays their own identities.

Identity analysis

Locating the narrator within the discourse of portraying Mexicans entails examining the etic meanings of stories as commentary about the other (as the previous section did), the meanings of stories as reflexive commentary on the teller, and the stories' implicative meanings for the autobiography of the actual

person of the teller. Harré and van Langenhove (1999b) caution that “the self has no plot, only persons (that is selves as expressed in social life) can have plots” (p. 70). The ethnographic field work is helpful for this interpretive step, as it provides at least partial access to the local spheres of meaning within which storytellers engage in their narrative activity. Gubrium (2001) argues that local spheres of meaning provide horizons of shared understanding of narratives and demonstrates that storytellers often edit their own narrations to “shape the environment for their [stories’] reception” (p. 28).

The contradictory characterizations of Mexicans can be understood by closer examination of how the narratives are produced—focusing on their limiting factors and relevant local spheres of meaning. Saying that Mexicans are friendly and helpful reflects a longstanding positioning of Mexicans as benign and as operating socially to enhance the ease and pleasure of the expatriate community. All descriptions offered of friendliness and helpfulness either are simple acts of normal courtesy and deference, or are framed within the employer-employee relationship of expatriates and their servants. These positive qualities ascribed to Mexicans also give contour to expatriates’ capacity for appreciation and acknowledge their worth in meriting such deferential treatment on the part of their host culture. Moreover, the moral right to assign character descriptions to Mexicans entails the positioning of expatriates as legitimate evaluators, as the party in the relationship whose vision extends beyond the day to day interaction and sums it up from an elevated vantage point of superior values and social standing.⁷

A limiting condition on these positive qualities is the impossibility of close relationships, including most romantic liaisons. The stories about this impossibility tell of Mexicans’ inaccessibility, resentment and exploitiveness, including routine petty theft by servants. Positioning Mexicans in this way renders their friendliness and helpfulness as surface-level sentiments and acts, and it solidifies that superficiality and keeps it from being seen as either paradoxical or as an opening to greater intimacy. It also positions expatriates as personally blameless for the failure of close relationships to happen. The extreme case of this limiting condition is found in the black widow stories. Thus, the storyteller is a person who appreciates the virtues of Mexican hosts but is constrained from more personal relationships by the hosts’ own active resistance, and a severe price might be paid for breaching that constraint. Contributing to this perceived resistance is a key local sphere of meaning grounded in the taken-for-granted expectation that expatriates will employ Mexican servants, minimally a maid and a gardener. The main opening for personal interaction between expatriate society and Mexicans is in this employer-employee relationship and to a lesser extent in service encounters in the community.

Many astute expatriate retirees cite personal cultural differences and different “standards” as factors that contribute to the distance in relationships with Mexicans; however, the solution proffered in stories about frustrations with Mexicans’ behavior is, as retiree Bob Danner says, to learn to be tolerant and lower expectations.

BD The downside is just getting adjusted to living here and not having such high expectations of things. . . . Oh it probably is a learning process of going through all these frustrations uh and-ah there were ti-times earlier on when you know it’s just like I’m outta here, this is it, this is the last straw and I think if you, I think everyone has to go through that in order to adapt to the culture here. It’s the way things are, the reality of it, and, and I think we both changed a lot in our expectations.

Lettie Holmes explains, perhaps only partly metaphorically, that the parties are positioned as agents in a service relationship:

SB What kind of characteristics does a person have to have to develop an attitude that—what kind of people do the best here?

LH Well first of all, you have to realize that you are in somebody else’s country and you’re a guest here, and ah you’re not going to change them all to meet your, your standards.

In the hospitality industry (where motels often call themselves “host” and renters are called “guests”), hosts welcome guests into their facilities for temporary stays and strive to make guests feel comfortable while helping them achieve their purposes. It is a business relationship masquerading as a personal one. Thus, guest standards should dominate but can not be demanded of the hosts, and guests should not expect to be able to change all hosts to meet their standards. Implicitly, expatriates’ standards are higher than those of the hosts; this perspective positions retirees as having a moral obligation to tolerate frustrating differences. To celebrate, join with, or seek mutual adjustments would be to risk validating the host practices as of equal or superior moral and practical standing.

The host culture is narrated as impenetrable and the expatriate one as necessarily adaptable. Thus, the attribution of corruption, captured in myriad stories about *la mordita* (the petty bribe, literally “the nibble”), is narrated within a local sphere of meaning that rides on the idea of tolerance and lowered expectations, and the nature of police:

FD You know, h-h-how much how much is it going to take for me to solve this problem? Or when you get sto- you get stopped by the cop up in ah

Guadalajara, he says you're speeding and y-you say what are you talking about, people were passing me on both sides? Well I'm sorry you were speeding here's the book and it says you owe this much. You pay a mordita and he gives i- he goes away. Ahm ((clears throat)) we came across the border one time with the motorhome and ah crossing person looked in the bays and said oh you can't take all of—no, no, no, we're going to have to charge you for this and charge you for that, and oh my god look at all this stuff, that's more, and and I finally said, Bob, ((chuckles)) get twenty bucks out of your pocket. And then the guy said well okay this time, and he ((claps hands)) that was it. He was gone.

SB Yeah.

FD So yeah, it's a part of life and you better just ahh do it.

Flora's "problem" was a traffic officer improperly accusing her of speeding, or a border guard objecting to the contents of the motorhome, and the conventional way the problem is solved is to pay a bribe. The procedure is "part of life" and one just does it. The storyteller is a functioning part of a system of corruption, but here she is a victim and the Mexican police officer is the criminal. The ubiquitous stories of bribery position the storyteller as the target of an extortionist; however, the storyline includes descriptions of expatriates conforming to another standard, which is perforce to ignore the rules of law in the first place, a standard that the wise expatriate will not endeavor to change. The local sphere of meaning includes the traditional positioning of police officers as inept, corrupt and uninterested in enforcing the letter of the law. Storytellers are positioned reflexively as resourceful, adaptable problem-solvers.

The identity implications of these narrations will vary in details from individual to individual. The pattern of positionings, however, reflexively reveals an expatriate agent who is self-characterized as charitable and welcomed in the host community, appreciative of Mexicans' justifiable amiability, superior in the receipt of deference, clever and resourceful in intercultural conflicts, and tolerant of Mexicans' resentments, exploitations and cultural standards.

Conclusions

These implicit self-attributions construct a narrative of adjustment whose logic is hidden within the soliloquies and stories about Mexicans. That adjustment narrative reveals a struggle to conserve cultural identities in the face of a resistant host culture that has been colonized. It is indeed the face of Mexicans that is at stake: The Lakeside economy is dominated by expatriate consumer demand; indigenous commerce in fishing has disappeared as

new employment opportunities opened up in the services sector; local prices for real estate (routinely listed in U.S. dollars), restaurant dining, hotel lodging and most consumer goods are higher than in comparable non-retirement areas; traditional Mexican community life centered around the family has been supplemented, and in some instances supplanted, by expatriate community life centered around public assistance and volunteer programs (Otero, 1997); and the uniform use of Spanish in public life is displaced by the use of English.

Expatriate retirees strive to preserve the surface harmonies and utilities in their relationships with host Mexicans by friendship-claimings and phatic rituals (Marcel Fournier, a retired attorney, warned "never chew out a Mexican [but] give them little tokens of appreciation, like chocolates or perfume" to smooth out relationships). At the same time, expatriate retirees acknowledge cultural differences and strive to preserve their home cultural values, and in so doing they strive to preserve those values that earmark a desirable self-identity. Those very values are reciprocals of and built into the projected evaluations and narratives about Mexican hosts: As individuals they are friendly, warm and polite; reciprocally, expatriates merit friendliness and courtesy. By emphasizing these individual portrayals of Mexicans, guests pay the requisite compliments to their hosts, while validating the decision to relocate in the first place. In the central form of intercultural relationship, the employer-employee contract, Mexicans are subservient, while expatriates are in control. As a national culture, they are intractable, so expatriates have learned to be patient; they are inaccessible, and the expatriates must be tolerant.

These homologies and antipodes respond to expatriate retirees' desires both to appreciate the host culture and to preserve the home culture; both to maintain a critical stance and to honor the cultural imperative to be rational in the retirement migration decision. The dialectic of desires that underwrite the soloquies and narratives I have heard is expressed poignantly by Flora Deutsch:

FD But my goal in life is to find a comfortable place to live within my own culture while experiencing another culture, so this is fine for me and I don't have any problem with too many gringos. I don't think there can be too many ((laughs)) . . . I think for the most part they [Mexicans] ignore us w-we don't really figure in their lives. And when you travel to other Mexican cities—and we've been to Morelia and Queretero and Cuernavaca and all these places—and you see ahm how small a group we really are compared to the millions of people that live in this country for whom we have no impact whatever.

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Notes

1. McHugh & Mings (1996) point out that, while most studies assume migration and aging in place to be mutually exclusive choices for retirees, the case of seasonal migration calls into question the concepts of "home" and migrating retirees' "experience of place." They conclude that retirees transform the meanings of home and place as they negotiate identities and communities to fit their needs and values: "Cultivating communities rich in meaning fosters identity and well-being in aging . . . Retirement communities are underlain by values of sociability, activity, and equality that foster a strong sense of belonging and collective identity" (p. 546). The term "international migrant retiree" includes seasonal migrants; "expatriate retiree" is meant to include only international migrants who have permanent, year-round residence in a foreign host country.
2. Among the amenities of the Lake Chapala Riviera towns are commercial centers offering most consumer goods, modern medical clinics and nursing homes, excellent restaurants, theatres for both cinema and live performances, galleries, boutiques and crafts fairs, and a seemingly endless supply of community organizations (most of which were founded and run by expatriates) that offer opportunities for volunteer work. In nearby Guadalajara are world-class museums, theatre, architecture and musical venues, as well as major medical centers, universities, and megastores, like WalMart and Costco.
3. Further descriptions of the development of the expatriate community, particularly at Ajijic, can be found in Stokes (1981) and Truly (2002).
4. The term "gringo" is used by expatriates to refer to any non-Mexican, regardless of nation of origin. Participants in this study report that "gringo" has no pejorative meaning among expatriates but might be considered impolite by Mexicans, if it were used by Mexicans to refer to non-Mexicans.
5. Excerpts of the transcribed data shown here have been simplified for ease of reading. All interviewees' names have been changed.
6. It is unavoidable that the interviewer is part of the dialogue in which the stories that serve as data are created. I asked questions, encouraged participants in their contributions to the dialogue, and offered comments, evaluations and stories of my own. The stories, assessments and characterizations in the transcribed texts, however, are theirs and are taken to express genuine sentiments and judgments that animate their lives beyond this project.
7. Discourse locating the site of expatriate-Mexican engagement is saturated with the use of "down here." As reflected in the transcripts and field notes, "down here" is the most conventional way retirees refer to being in Mexico. While Lake Chapala is well south of the US-Mexico border, it is—on par with Denver, Colorado—hardly "down" in elevation; yet to go down to Mexico is to leave some location higher up; down in the storyteller's original cultural milieu has negative valence, might be contaminated or associated with the

underworld; indeed, one of the social conditions in the Lakeside community that participants repeatedly say one must learn to tolerate is the criminality and corruption in everyday life.

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