

Surveys Results for Briefing #5 (Housing and Real Estate Trends among Americans Retiring in Mexico's Coastal Community)

Below are basic survey responses for Questions Q17, Q22-Q25, Q30, Q34, Q36-Q38, Q40-Q41, Q58 & Q61, based on the 842 participants in ICF's modified data set (prepared by Crossborder Group).

| Q17 - If you were to purchase a home in Mexico, what key considerations do you consider important? | | | | | | | |
|---|-----------|---------|---------------|--------------------|----------------|-------------|-------|
| | | Neutral | Not Important | Somewhat Important | Very Important | No Response | Total |
| Price | Frequency | 45 | 6 | 164 | 489 | 138 | 842 |
| | Percent | 5.3 | .7 | 19.5 | 58.1 | 16.4 | 100.0 |
| Legal (including clarity of title) | Frequency | 21 | 5 | 62 | 631 | 123 | 842 |
| | Percent | 2.5 | .6 | 7.4 | 74.9 | 14.6 | 100 |
| Locating in a planned unit development with infrastructure | Frequency | 152 | 238 | 156 | 159 | 137 | 842 |
| | Percent | 18.1 | 28.3 | 18.5 | 18.9 | 16.3 | 100 |
| Ease of day to day living | Frequency | 63 | 10 | 257 | 397 | 115 | 842 |
| | Percent | 7.5 | 1.2 | 30.5 | 47.1 | 13.7 | 100 |
| Proximity to key cultural amenities | Frequency | 224 | 59 | 283 | 130 | 146 | 842 |
| | Percent | 26.6 | 7.0 | 33.6 | 15.4 | 17.3 | 100 |
| Proximity to natural habitats | Frequency | 201 | 40 | 268 | 198 | 135 | 842 |
| | Percent | 23.9 | 4.8 | 31.8 | 23.5 | 16.0 | 100 |
| Proximity to other U.S./Canadian expatriates | Frequency | 172 | 122 | 280 | 128 | 140 | 842 |
| | Percent | 20.4 | 14.5 | 33.3 | 15.2 | 16.6 | 100 |
| Proximity to local Mexican community | Frequency | 151 | 29 | 304 | 214 | 144 | 842 |
| | Percent | 17.9 | 3.4 | 36.1 | 25.4 | 17.1 | 100 |
| Access to health care | Frequency | 51 | 7 | 233 | 432 | 119 | 842 |
| | Percent | 6.1 | .8 | 27.7 | 51.3 | 14.1 | 100 |
| Safety | Frequency | 40 | 4 | 188 | 472 | 138 | 842 |
| | Percent | 4.8 | .5 | 22.3 | 56.1 | 16.4 | 100 |
| Availability of water and other basic utilities | Frequency | 22 | 3 | 129 | 574 | 114 | 842 |
| | Percent | 2.6 | .4 | 15.3 | 68.2 | 13.5 | 100 |
| Environmental considerations | Frequency | 111 | 20 | 319 | 238 | 154 | 842 |
| | Percent | 13.2 | 2.4 | 37.9 | 28.3 | 18.3 | 100 |

| Q22 - What percentage of Americans live in your planned unit development? | | |
|--|-----------|---------|
| | Frequency | Percent |
| No Response | 53 | 6.3 |
| Don't know | 18 | 2.1 |
| Zero (0%) | 17 | 2.0 |
| Up to 25% | 65 | 7.7 |
| Greater than 25% but less than 50% | 60 | 7.1 |
| About 50% | 68 | 8.1 |
| Greater than 50% but less than 75% | 81 | 9.6 |
| Greater than 75% but less than 100% | 126 | 15.0 |
| About 100% | 18 | 2.1 |
| I do not live in a planned unit development | 336 | 39.9 |
| Total | 842 | 100.0 |

| Q23 - Does your community have a Homeowner's Association? | | |
|--|-----------|---------|
| | Frequency | Percent |
| No Response | 98 | 11.6 |
| Don't know | 31 | 3.7 |
| No | 334 | 39.7 |
| Yes | 379 | 45.0 |
| Total | 842 | 100.0 |

| Q24 - Do you live in a gated community? | | |
|--|-----------|---------|
| | Frequency | Percent |
| No Response | 63 | 7.5 |
| No | 455 | 54.0 |
| Yes | 324 | 38.5 |
| Total | 842 | 100.0 |

| Q25 - Based on your experience, what advice would you give to potential retirees with regards to buying property in Mexico? | | |
|--|-----------|---------|
| | Frequency | Percent |
| Take a leap of faith that everything will work out okay | 128 | 15.2 |
| Understand the risks of buying a home in a foreign country | 577 | 68.5 |
| Hire a good lawyer | 278 | 33.0 |
| I would not buy property in Mexico | 27 | 3.2 |
| Beware of squatters that could invade your property if you buy vacant land | 100 | 11.9 |

| Q30 - What key factors would lead you to leave Mexico? | | |
|--|-----------|---------|
| | Frequency | Percent |
| Escalating drug violence in my community | 363 | 43.1 |
| Noticeable increase in crime impacting American retirees or tourists | 485 | 57.6 |
| Declining quality of life due to increased urban growth | 254 | 30.2 |
| Declining environmental quality (increased sewage runoff, litter, water pollution) | 375 | 44.5 |
| Growing poverty | 88 | 10.5 |
| Increase in the cost of living | 332 | 39.4 |

| Q34 - How would you describe your current living unit? | | |
|---|-----------|---------|
| | Frequency | Percent |
| No Response | 61 | 7.2 |
| High-rise condo/apartment | 34 | 4.0 |
| Mid-rise condo/apartment | 166 | 19.7 |
| Other | 55 | 6.5 |
| Single-story home attached | 42 | 5.0 |
| Single-story home detached | 228 | 27.1 |
| Two-story home attached | 67 | 8.0 |
| Two-story home detached | 189 | 22.4 |
| Total | 842 | 100.0 |

| Q36 - What are the aspects of your coastal lifestyle that you find unattractive? | | |
|---|-----------|---------|
| | Frequency | Percent |
| Litter | 464 | 55.1 |
| Sewage runoff to beaches and/or oceans/sea | 405 | 48.1 |
| Traffic | 253 | 30.0 |
| Unplanned urban growth | 291 | 34.6 |
| Rules and Regulations in my planned unit development are not enforced | 105 | 12.5 |
| Overdevelopment | 221 | 26.2 |
| Noise pollution | 202 | 24.0 |
| Visual pollution (including blockage of coastal view corridors) | 193 | 22.9 |
| Access to the beach has become more restricted | 137 | 16.3 |

| Q37 - How has the economic recession in the United States impacted your Mexican retirement plans? | | |
|--|-----------|---------|
| | Frequency | Percent |
| No Response | 63 | 7.5 |
| I will spend about the same amount of time in Mexico | 228 | 27.1 |
| I will spend less time in Mexico | 38 | 4.5 |
| I will spend more time in Mexico | 163 | 19.4 |
| No impact | 350 | 41.6 |
| Total | 842 | 100.0 |

| Q38 - How has the economic recession impacted the quality of your life in Mexico? | | |
|--|-----------|---------|
| | Frequency | Percent |
| Less disposable income | 321 | 38.1 |
| Closure or reduction of services/cultural amenities | 54 | 6.4 |
| Increased crime and delinquency | 184 | 21.9 |
| Reduction in municipal services (water, trash collection, police) | 34 | 4.0 |
| Fewer visits to/from friends and family | 301 | 35.7 |
| Not Applicable. My quality of life has not been impacted | 286 | 34.0 |

| Q40 - To what extent were issues of environmental sustainability important to you when you purchased/selected your home in Mexico? | | |
|---|-----------|---------|
| | Frequency | Percent |
| No Response | 64 | 7.6 |
| Neutral | 186 | 22.1 |
| Not Important | 58 | 6.9 |
| Somewhat Important | 317 | 37.6 |
| Very Important | 217 | 25.8 |
| Total | 842 | 100.0 |

| Q41 - When searching for a home, did you feel like you had options to choose from that were (or were marketed as) "green" or environmentally sustainable? | | |
|--|-----------|---------|
| | Frequency | Percent |
| No Response | 72 | 8.6 |
| Don't Know | 163 | 19.4 |
| No | 475 | 56.4 |
| Yes | 132 | 15.7 |
| Total | 842 | 100.0 |

| Q58 - Have you considered assisted living options for yourself or your spouse in Mexico? | | |
|---|-----------|---------|
| | Frequency | Percent |
| No Response | 80 | 9.5 |
| No | 545 | 64.7 |
| Yes | 217 | 25.8 |
| Total | 842 | 100.0 |

| Q61 - How do you customarily travel between Mexico and the US? | | |
|---|-----------|---------|
| | Frequency | Percent |
| Car | 419 | 49.8 |
| Airplane | 431 | 51.2 |
| Bus | 7 | .8 |
| Boat/Yacht | 2 | .2 |
| Other | 3 | .4 |