

Spatial capability and conformity: A qualitative study of happiness in Mexico City and San José

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Abstract

This qualitative study focuses on how individuals living in two Latin American countries that rank highest in the happiness index develop and sustain their happiness. While most happiness research employs quantitative methods to compare national happiness levels, recent studies advocate for a contextual and process-focused perspective on happiness. This research emphasises the spatial aspects of happiness and strategies people use to enhance it, contributing to a deeper understanding of happiness in diverse environments. The cases are Mexico City, Mexico and San José, Costa Rica, which consistently rank high in happiness despite their low GDP. A total of 16 in-depth interviews were carried out online with participants living in each of the case study sites. The findings reveal that interviewees' happiness is shaped by context-specific factors like weather, food, security, and housing. The COVID-19 pandemic, which restricted mobility and impacted housing quality, highlighted barriers to spatial capability. The research shows that individuals developed happiness strategies and community participation to enhance their life satisfaction and happiness capability. Conformity-driven happiness emerges as a cultural phenomenon, essential to life satisfaction. The paper contributes to a nuanced understanding of happiness in different environments and people's strategies for enhancing happiness.

Keywords

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Highlights for public administration, management and planning:

- **Influence of Environmental and Social Factors on Happiness:** For public administration and urban planning, this study highlights how basic life conditions, as well as creating and maintaining environments, enhance residents' wellbeing and happiness.
- **Role of Spatial Capability in Happiness:** For public policy and management, the concept of spatial capability emphasises the need to improve housing quality, urban design and transportation to support citizens' overall happiness and wellbeing.
- **Impact of Social Support and Conformity on Well-being:** For public administration and community planning, fostering strong social networks and supporting mental health initiatives can be vital in promoting residents' happiness and mental wellbeing.
- **Implications for Public Policy and Urban Planning:** The findings suggest that public policies should aim to enhance people's capabilities by providing secure housing, efficient mobility, and support for social groups. This approach can help in creating happier, more sustainable communities.

1 Introduction

Happiness research has attracted an increasing attention in various social science disciplines in recent years. Based on quantitative approaches, the majority of happiness researchers measured different countries' happiness levels (Ahmed 2007; Eckersley 2008; White 2010) for the purpose of comparisons. Despite its contribution to the understanding of different levels of happiness in different places, recent studies (e.g., Smith & Reid 2018) have increasingly pointed out the gap in research on happiness should contextualize individuals' circumstances (Ramia & Voicu 2022) and view happiness as a continuous process rather than a fixed status. Sen's capability approach has garnered significant attention and has contributed to understanding happiness in contextualized situations. However, the application of this approach in the spatial domain (Grove 2021) remains relatively unexplored. In this study, we applied a qualitative approach to examine the process by which individuals developed and sustained happiness in Mexico City, Mexico, and San José, Costa Rica. By concentrating on the spatial aspects of happiness and happiness strategies, this study contributes to a nuanced understanding of happiness in different environments and people's strategies for enhancing happiness.

This study's theoretical contributions are twofold. First, to address the call for qualitative (Foley et al. 2021), process-focused human geographic research on happiness (Smith & Reid 2018), it elucidates the concept of spatial capability, which emerged from Amartya Sen's capability approach. Capability refers to the freedom to choose a different way of life (Sen 1999), and spatial capability is defined as capability in the domains of residence and mobility. Second, based on grounded theory, which considers happiness to be something that is created through an individual's response to the social environment, the research emphasizes the capability for happiness based on the idea that conformity and social support mediate individual responses. Conformity refers to compliance with socially accepted conventions or standards when facing life constraints. The notion of conformity has been criticized by Sen (1999), Hamilton (1999), and Hill (2003), who argued that metrics of happiness may neglect the extent of deprivation. However, Nussbaum (2000, 2003) and Elster (1983) argued that conformity is positive because it is instrumental in reducing the tension and frustration that arise when one has an unsatisfiable desire to possess certain things. Since the publication of the first World Happiness Report in 2012, Costa Rica and Mexico have con-

tinually ranked highest among the world's developing countries and higher than the global average despite the South American region's low Gross Domestic Product (GDP)¹. The high levels of happiness in these countries demonstrate the validity of Easterlin's paradox that economic well-being does not necessarily promote happiness (Conradson 2012; Easterlin et al. 2010; O'Neill 2016). They also highlight the need for contextualized qualitative research on happiness (Smith & Reid 2018). Despite newspapers proclaiming that Latin American countries are the happiest in the world, we are aware that there is great diversity in happiness among different cities and countries (Lora 2008). Our intention in this study was not to produce generalizable results, but instead to investigate the processual formation of happiness over time based on the narratives of different age groups—elderly and young people—living in the capital cities of Mexico and Costa Rica.

The following six sections of this paper address the preceding arguments. In the next section, we discuss the existing literature regarding the concepts of spatial capability and conformity. In the third section, we outline the research methodology employed for this study. In the fourth section, we briefly introduce the features of Costa Rica and Mexico. In the fifth section, we consider how the interview subjects defined happiness and what factors strengthened or limited their spatial capability. In the sixth section, we focus on conformity and interpersonal social relations. This paper closes with concluding remarks and suggestions for future research on happiness, particularly in the discipline of human geography.

2 Previous studies on happiness and conformity

Previous human geographic studies on happiness have examined issues such as health (Atkinson & Scott 2015; Fleuret & Atkinson 2007; Kearns et al. 2014), well-being (Conradson 2012; Scott 2012; Sender et al. 2021), and sustainability (Cosimato et al. 2021; Petrovič & Murguš 2020) using quantitative research methods. In recent years, more attention has been given to the idea that happiness should be viewed as a process rather than a fixed state (see Alacovska et al. 2021, for example), and that researchers should consider individual responses rather than generalized images of happiness in society. Smith & Reid (2018) called for qualitative research that contextualizes journeys toward happiness (Casteren et al. 2021). They argued that location is intricately linked not only

to natural conditions, but also to social conditions, cultural characteristics, and human and nonhuman relationships (Conradson 2003; Haybron 2011; Panelli & Tipa 2007; Tucker 2010).

The capability perspective has influenced previous debates on well-being, quality of life, and welfare and has been a major focus of happiness research (Clark 2005; Deneulin 2013; Grove 2021; Hamilton 1999; Hill 2003; Hirai et al. 2016; Nussbaum & Sen 1993; Sen 1984, 1985, 1993, 2008; Punová et al. 2020; Robeyns 2003). The capability theory is useful for developing a contextualized and processual approach to happiness (Smith & Reid 2018). For example, a disabled person who needs to use a wheelchair for mobility may need more income because it costs more to live. Income or transport facilities are not happiness goals in themselves, but are instruments for obtaining freedom, access to desired locations, and mobility (Rodríguez-Pena 2022; Shliselberg et al. 2020). The capability theory also considers unequal resource distributions within households and urges researchers to assess the well-being of individuals rather than households (Nussbaum 2000; Sen 1992). Even if a family is affluent, gender inequality may effectively block the transfer of economic wealth to certain individuals (Sen 1987), meaning that women in a household are poorer in terms of capability (Pettit 2001; Sen 1992, 1999). The capability theory sees happiness as an important human functioning and the “*capability to be happy*” (Sen 2008:26) as a major aspect of freedom.

Despite the contributions of these previous discussions based on the capability theory, the following two aspects have not been sufficiently developed and deserve more attention. First, especially for geographers, capability has not been sufficiently spatialized. Research approaches should specify types of capability rather than prescribing the capability humans need (for a discussion of prescription, see Robeyns 2003), because different societies and times define the capabilities that are socially important (Sen 1992, 1999). Human geographers have developed normative capability approaches (Olson & Sayer 2009) and considered transport geography (Ryan et al. 2015), geographic education (Lambert et al. 2015), international development (Deneulin 2013), mobility (Kronlid 2008; Sager 2006), and well-being (Fleuret & Atkinson 2007), but they have neglected the spatial aspects of these phenomena (Robeyns 2003). An increasing number of studies, including those by Grove (2021) and Rodríguez-Pena (2022), have focused on capability in mobility and places. However, the spatial

domain of the capability approach has not been fully linked to well-being and happiness.

This paper clarifies the intersection of spatial capability and happiness. The concept of “*spatial capability*” (Shin 2011) refers to the spatial aspects of capability. In terms of residence, the spatial capability approach emphasizes housing security and the freedom to make housing choices, which are key themes in geography and urban studies. Since the 2000s, house prices in many large cities have risen sharply, with significant implications for economic inequality and the material and psychological well-being of residents (Dreier et al. 2014). Regarding mobility, since the 2000s, discussions of mobility have focused on freedom of mobility (Nordbakke & Schwanen 2014; Shareck 2014; Shareck et al. 2014; Kim & Shin 2018; Shin 2011)—not on whether people actually move, but whether they can move if they so desire, linking mobility to well-being and happiness (Ferdman 2021; Psarikidou 2020; Vecchio 2020). For example, if a woman is responsible for childcare and domestic work and has to travel to work, a day care centre, and a delicatessen during the day, her spatial capability is limited, even though she is mobile (Morin & Guelke 2007; Secor 2002, 2004). In addition, concerning domestic and international migration, the question of whether migrants choose to migrate is a key issue (Kaufmann 2002; Sager 2006).

Second, the process of developing the capability to be happy deserves more attention. A critical challenge in researching happiness is that external conditions do not directly lead to happiness. People’s satisfaction with their capability sets is not necessarily the same as their capabilities set because satisfaction is influenced by adaptive preferences, mental health (Robeyns 2017), and sociability (Ahmed 2008). The capability theory holds that enhancing people’s functioning and capabilities increases their feelings of happiness and satisfaction. It emphasizes that even if work is stressful, the meaning work brings to people’s lives is conceptualized as general functioning (Robeyns 2017). Work also strengthens ‘their capability to be happy’ by changing their mindsets or providing social support. Happiness results from subjects’ adaptive preferences, such as their acceptance and interpretation of situations (Robeyns 2017); subjective satisfaction can be high in situations with significantly limited capabilities, and vice versa.

The idea of subjective compromise is controversial. On the one hand, Sen (1984) claimed that if people adapt to deprived circumstances and learn to be “happy” with limited pleasure, they will not seek to better their circumstances (Qizilbash

2006). (Robeyns 2017:110) pointed out that “a policy that anticipates such adaptation processes is morally and politically problematic.” On the other hand, adaptive preferences are viewed as happiness strategies that enable people to rationalize and appreciate their deprived circumstances (Bruckner 2009; Teschl & Comim 2005), and the resulting conformity reflects the flexibility and resourcefulness of the marginalized (Harvey & Reed 1996). Elster (1983) viewed conformity as the pursuit not only of economic interests but also of psychological comfort (Folbre 1986; Fortuijn & Ostendorf 2004; Kabeer 1999; Robeyns 2003). Although happiness strategies can either constrain or expand human capability, the process by which individuals develop their capability to be happy is itself important for advancing human capability. Culture is constraining and enabling simultaneously (Alexander 2003; Hays 2000). Khumalo et al. (2020) argued that “the manner in which communities are structured is determined by cultural norm regulation and plays a role in how individuals define happiness, pursue it, and benefit from such pursuits” (Khumalo et al. 2020:1684).

3 Research design

3.1 Methods

The data for this paper were obtained using qualitative methods (Glaser & Strauss 2017; Ritchie et al. 2013; Sanchez-Sanchez 2017). We conducted in-depth interviews with roughly pre-defined main points to be asked (MacLure 2013; Schmidt et al. 2004) with 16 individuals living in Mexico City and San José. In each city, the first age group consisted of young people aged 20–39 years, and the second group comprised seniors aged 60 years or older (Kwak 2013). Table 1 summarizes the interviews, including their pseudonyms, sociodemographic characteristics, and the time and place of each interview.

Since the fieldwork for this study was conducted during the COVID-19 pandemic, the interview subjects were recruited through open-call posts on social media networks, such as Facebook and Twitter. The recruitment posts explained the research in detail and provided a link to a Google Forms survey that we asked potential interview subjects to complete and submit. Since most respondents were young, we asked them to connect the researchers with potential elderly interviewees and assist them in conducting online interviews. The interviews were conducted using Zoom, either in Spanish or English, and each lasted from one-and-a-half

to two hours. Before the interview started, each interviewee consented to having their interview recorded in audio format. The interviews were read repeatedly and analysed in interpretative methods, which focused on the sequences and implications of events. For research ethics, pseudonyms are used herein when quoting the interview subjects, and the interviewees were notified of their right to withdraw and about data protection. The interview summary is attached in Table 1.

3.2 Case study background

The focus of the study was on the capital cities of two countries: San José in Costa Rica and Mexico City in Mexico. San José is the centre of political and economic life in Costa Rica, with around 330,000 people residing in the city proper and approximately 2 million in the metropolitan area. Costa Rica, named the happiest country in Latin America and the Caribbean, stands out for providing access to health care, education, and basic public services for most of its population. This sovereign Central American nation, bordered by Nicaragua to the north, Panama to the south, the Caribbean Sea to the east, and the Pacific Ocean to the west, has a small land area of 51,100 km² and a population of approximately 5,132,000 people (INEC 2023). Notably, about a quarter of its territory is dedicated to wildlife conservation in national parks and protected areas. Once primarily agrarian, Costa Rica’s economy has expanded to include finance, corporate services, pharmaceuticals, and ecotourism. The country abolished its military forces in 1949 after a brief civil war, making it one of the few countries without a standing army. Costa Rica consistently performs favourably in the Human Development Index (HDI), and it ranked 62nd globally and 5th in Latin America in 2019 (UNDP 2019). The United Nations Development Program (UNDP) recognizes its high HDI value compared to other countries with similar income levels, and its standard of equality is higher than the regional median. According to various comparisons of democracy, political stability, press freedom, and subjective happiness, Costa Rica excels. The country ranks ranking 91st out of 100 on Freedom House’s Freedom in the World Index, where the closer a country’s score is to 100, the more free it is considered (Freedom House 2023). Costa Rica also ranked 12th on 2019 the World Happiness Report (Helliwell et al. 2019). Mexico City, the capital of Mexico, is the most densely populated city in North America, with around 21,782,000 people living in metropolitan areas and 8.9 million within city limits (UN 2022). Mexico, a Latin American country bordered

Table 1 Summaries of the interviews

	Pseudonym	Interview date	Interview place	Age	Education level	Location
1	Elena	13 August 2020	Zoom	70	College	Heredia, Central (outskirts of San Jose)
2	Alani	13 August 2020	Zoom	20 ^s	On-going college	San Jose
3	Mateo	14 August 2020	Zoom	20 ^s	College	San Jose
4	Cristina	19 August 2020	Zoom	29	College	San Jose
5	Vanessa	20 August 2020	Zoom	60	High school	San Jose
6	Daniel	21 August 2020	Zoom	29	Finishing Masters	San Jose
7	Alberto	21 August 2020	Zoom	60	High School, some college	San Jose (outskirts)
8	Rodrigo	3 Sept 2020	Zoom	62	Masters	San Jose
1	Noelia	29 July 2020	Zoom	29	College	Mexico City
2	Alejandra	4 August 2020	Zoom	22	On-going College	Mexico City
3	Eduardo	5 August 2020	Zoom	20 ^s	Masters	Mexico City
4	Santiago	12 August 2020	Zoom	28	On-going PhD	Mexico City
5	Diego	22 August 2020	Zoom	62	College (Normal de Maestros/Teachers educ.)	Mexico City
6	Maria	24 August 2020	Zoom	82	College	Mexico City
7	Laura	25 August 2020	Zoom	60 ^s	Masters	Mexico City
8	Monica	31 August 2020	Zoom	60 ^s	High School, Technical school	Mexico City

by the United States, Guatemala, Belize, the Gulf of Mexico, and the Pacific Ocean, is the 13th largest country globally in terms of land area (1,972,550 km²) with a population of 128.6 million people, Mexico is the 10th most populous country worldwide, with the largest Spanish-speaking population (UN 2022). As a developing country, Mexico ranks 74th according to the Human Development Index, boasting the 15th largest economy in terms of nominal GDP and the 11th largest in terms of purchasing power parity, with the United States as its largest economic partner. Due to its physical size, population, economy, and politics, Mexico is a regional power in Latin America and a middle power globally, often identified as an emerging power. However, Mexico faces challenges, ranking poorly on the Global Peace Index due to struggles with social inequalities, poverty, and high crime rates (IEP 2021).

The country maintains a robust tourism sector and attracted 39 million tourists in 2018, ranking as the 6th most visited country globally. Mexico holds the 7th position globally for the number of The United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Sites—the largest number in the Americas (UNESCO 2022). Additionally, it is an ecologically megadiverse country, ranking 5th globally for natural biodiversity. The 2019 World Happiness Report ranked Mexico in the 24th position globally, but

2nd in Latin America, following Costa Rica (Helliwell et al. 2019).

4 Results

4.1 Contextualizing happiness and spatial capability

In this section, we demonstrate how the interviewees achieved happiness through different experiences and their definition of well-being and happiness evolved over time. The basic conditions of life, such as the weather and food, were factors that many of the interviewees frequently referred to. They were aware that their countries had high levels of happiness despite being relatively poor economically, and they emphasized that this was due to the good weather, prolific natural environment, and abundance of cheap fresh food. Since these are available to most people, this means that the capability for happiness is not restricted to basic needs, and the interviewees, especially in Costa Rica, were aware of this.

Most interviewees from San José explained that outside the main city centre, nature was on their doorstep. Many of them associated nature with enjoyable pastimes, often citing proximity to mountains, forests, and rivers as significant pleasures. They considered natural surroundings integral to their social gatherings, during which they re-

ported feeling happy. Mexican interviewees explained that most Mexico City residents do not leave the metropolitan area to see the ocean or even the mountains surrounding the city. Within the city, there are green spaces and parks, the largest of which is the Chapultepec Forest, which has been likened to New York's Central Park. The differences between these urban settings uniquely influence happiness in their respective locations, and the two cities offer different experiences of nature.

A common factor that most Costa Rican interviewees mentioned was food and the fact that even poor people can eat fresh fruits and vegetables. They highlighted the readily available, affordable fresh foods that their consistently warm climate offers as an important source of happiness. Cristina said:

Well, we don't really have a highly developed economy like other countries, but I think the resources that we have are plentiful in other ways. We have abundant food and scenery, and we have plentiful health care and water. These are very basic things, but we value them. (Interview on August 19, 2020)

This statement suggests that even those with limited means can obtain enough food to meet their basic needs. These interview subjects explained that they did not consider this previously, but the changed social atmosphere changed people's views on foods. Cristina explained that when she was a child, her parents, who were lawyers, were too busy working outside the home to cook often, and American fast food was quick and convenient compared to fresh vegetables. At that time, buying vegetables at the local market in Costa Rica was seen as a sign of poverty. However, in recent years, as global concern for the environment and health has increased, taking care of one's health has become increasingly important, and fresh vegetables and fruits in the local market are now perceived as healthy. She also learned that cooking is more than the act of preparing food; it is an expression of care and love. Her story illustrates how a timely shift in social perception and discourse influences people's perspectives, consequently shaping their understanding of happiness.

Interviewees in both cities emphasized the importance of health and physical activities for happiness, saying that they increasingly realized their importance over time. For Alberto from San José, health became the foundation for happiness, since he learned that if he was not healthy, all other areas of his life, such as career, income, personal, and social relationships, recreational activities, and hobbies, suffered. During the interview, his face lit up, and he started to speak excitedly when asked

to talk about his favourite hobby, which was running. For many other interviewees, such exercise routines and outdoor activities functioned as coping strategies for managing stress, anxiety, and anger. These activities could be as strenuous as hiking, bicycling, or running, or as relaxed as taking a stroll to simply enjoy the peace and quiet of the forest.

In addition to health-related happiness gained through physical activity, some Costa Rican interview subjects discussed happiness in relation to mental health. Alani, who was in her 20^s, frequently mentioned the mental health movement during her interview. She explained that, to the older generation, any reference to mental health was taboo, but the younger generations were bringing mental health out of the shadows. Unlike older generations, young people are not only willing to openly discuss mental health issues, but to actively seek professional help and encourage others to do so as well. However, the elderly interview subjects expressed concern that young Costa Ricans work too hard these days because the current provision of basic social services makes performance solely the responsibility of the individual.

The interviewees also discussed social systems as essential for their happiness, particularly free education, health care, and the absence of military forces in Costa Rica. The interview subjects said that many Costa Ricans do not appreciate free education and comfort because they take them for granted, but when they think about it, they are grateful for them because they play a significant role in their happiness. The interviewees in San José proudly emphasized the social change that occurred after the military forces were disbanded. The benefit was not just the absence of military forces, but the fact that the absence led to a decrease in authoritarianism and violence in society. They claimed that the police, politicians, and others had adopted a softer, kinder demeanour.

The interviewees' spatial capability was generally good, especially that of the young interviewees in the specific context of big cities. Residential choices were comprehensive indicators, primarily linked to occupations and work and reflecting individual preferences. The youngest interviewees expressed positivity regarding life in metropolitan areas that provided job opportunities and cultural experiences, while elderly interviewees developed attachment to their cities over time.

Mateo, who was in his 20^s, said he lived in downtown San José, despite it not being a popular residential area. Having easy access to public transportation, cultural events, and convenient access in terms of socializing were the top priorities

for him. For Mateo, the first criterion for happiness was the freedom and ability to make decisions in his own life, enabling him to control how his life unfolded. Santiago, a Mexican in his 20^s, explained that his parents divorced when he was nine, and since then, he has lived alone in Mexico City, separated from other family members. He laughed as he recalled that the happiest time in his life was when he was exploring many new things in the city. He mentioned enjoying the excitement of dealing with new experiences.

The issues of safety and security were critical to the interviewees' spatial capability. In both Mexico City and San José, the interviewees explained that living in an affluent neighbourhood meant living in a place that was free from crime, drugs, etc. Young female interviewees were especially concerned about this issue, and they stated that they needed high-income jobs to protect themselves. For university student Alejandra, living in Mexico City was an absolute preference because of its plethora of job opportunities, concerts, and galleries. She acknowledged that living in Mexico City could be expensive and required a good job. However, she added:

I would always choose to live in a safe place, even if it cost more. Unfortunately, Mexico has a lot of unpleasant incidents, such as robberies, even in places like shopping malls. To live in a safe neighborhood, you need to have a lot of money. (Interview on August 4, 2020)

The interviewees contextualized their residential spatial capability in terms of safety and rents. These were major motivators for young people, including Alejandra, to work hard and obtain good jobs so that they could live in safe neighbourhoods with high property values.

However, the interviewees' spatial capability regarding mobility was limited by the COVID-19 restrictions. At the time of the in-depth interviews, movement restrictions were in place in the case areas. This caused distress for the interviewees, who were social and valued socializing. Mexican interviewees expressed their distress at the restrictions, stating that the time of the interviews was one of the unhappiest times of their lives because they were used to frequenting social gatherings on a daily basis. However, for Cristina, advances in information technology helped her overcome distances, and Internet access made her decide to move to a suburb. She mentioned that having a reliable internet connection for the past two years made the COVID-19 pandemic manageable. In terms of spatial capability, the pandemic elim-

inated traffic jams but simultaneously restricted freedom of mobility.

Other examples of constrained spatial capability were traffic jams and the travel necessary to maintain family life. It was often a trade-off between living with family and pursuing career goals. Interviewees in both cities highlighted commuting and traffic congestion as major problems of living in metropolitan areas. In San José, traffic was a problem, but it had recently improved. In Mexico City, traffic congestion was noted to be severe enough to reduce people's quality of life, demonstrating that daily freedom of movement is limited by available transport.

4.2 Enhancing the capability to be happy: work, conformity, and core groups

In this section, we discuss how the interviewees expanded their capabilities by finding meaning in their work, strengthening their adaptive preferences, and developing social support. Their capability to be happy includes the following three aspects: (1) finding meaning in daily work, (2) developing conformity, and (3) belonging to a core group.

First, a common concept running through most of the interviewees' definitions of happiness was having a sense of purpose and continuity in life. They also believed that focusing on their goals helped them overcome difficult times in their lives. The elderly interviewees admitted that although they doubted they would complete all their goals, the idea that they still had much to accomplish made them feel that their lives were worthwhile. Having many ongoing commitments prevented them from feeling that they had nothing more to do because they had "checked everything off their lists." Feeling useful and able to contribute in some way to their families, their communities, or even society at large helped them feel happy. San José interviewees identified "progress" and feeling that they were consistently making headway in their lives as key components of their happiness.

Some of the young Costa Rican interviewees who associated progress with happiness discussed it in terms of career success, financial remuneration, and promotion. Mateo, a Costa Rican in his 20^s, defined progress as personal improvement. As a young boy, Mateo lost both his parents. When he found himself in situations or circumstances that were outside his control, he tended to become frustrated, anxious, or angry. To calm these difficult and out-of-control emotions, Mateo said:

I remind myself of the things that have gone well in my life and the times I have felt in control. When

I review these positive events, I can see the progress I have made in my life and find happiness. (Interview on August 14, 2020)

As an orphan, Mateo was powerless to control the circumstances that directed his life, which led him to seek and value the freedom to make decisions for himself. He has come to equate feeling in control of his life with happiness.

Although the younger interviewees tended to be more career-oriented, they also claimed that family and friends were important to their happiness. Eduardo from Mexico City, who was in his 20^s, explained that when he was younger, professional advancement was his priority. He focused on his career, moving from Mexico to the United States and Asian countries for better opportunities. He confessed that when he lived in Mexico, he used to take his family for granted. As he grew older, and frequent migration meant he could not visit his family when he wished, he realized the importance of family. Now, he values progress in both his personal and professional lives.

Although most of the Costa Rican interviewees in the senior group had already retired, many still considered progress a key component of happiness. Vanessa, a retired 60-year-old Costa Rican woman, explained that, although she was heading into a late stage of her life, “progress” meant continuing to participate in activities that made her feel useful. Vanessa explained that her generation valued honest hard work and the feeling that they were contributing to something important or much bigger than themselves. Examples of their continuing contributions included volunteering their time and expertise as honorary consultants for non-governmental organizations (NGOs), businesses, or start-ups. Other interviewees reported holding positions within their communities that gave them a sense of purpose, such as helping to coordinate social, cultural, religious, or political events. When asked how they envisaged their lives in the years to come, many responded that they hoped to continue to “be useful” and to “keep contributing” to society in any way that they could.

It should be noted that the interviewees enlarged their capability to be happy by establishing happiness strategies to cope with unfortunate circumstances. Anyone may face unsatisfying life circumstances that are truly out of his or her hands, and it is not clear where to draw the line between the power of free will and the cultural practice of conformity, or between the consequences of strengthening status quo injustice and those of empowering people to survive. However, we found that although conformity was often a cop-

ing mechanism, being a member of a core group enhanced the interviewees’ capability for happiness. Some interviewees elaborated on their self-taught coping mechanisms for dealing with stress and emphasized that core groups helped them function and enhance their capability for happiness.

Many interviewees said that when they felt unhappy or faced problems, they would calmly remove themselves from the situation and detach from their negative emotions. They said that they had taught themselves to disconnect from negative emotions in such a way that when they felt angry, frustrated, or stressed, they simply left the moment. More specifically, they mentioned a variety of ways of doing this, including setting boundaries through training, going for a run, meditating, reading, or falling back on religious practices that reminded them they were imperfect human beings. Mexican interviewees, in particular, said that they had very low expectations of the state’s ability to protect them, and therefore worked hard to create their own inner happiness.

Notably, when asked about decision-making freedom in their lives, our female interviewees claimed complete autonomy. However, many revealed that they did not choose their undergraduate majors; their parents did. For instance, Maria, a senior Mexican interviewee, initially professed total freedom in her decisions, but later admitted that her mother pushed her to become a schoolteacher to ensure financial stability, despite her childhood dream of being a scientist. Maria, having taught for over 50 years, expressed anger about enrolling in a course that did not interest her, but she did not see her mother’s persuasion as a restriction on her freedom. When this apparent contradiction was highlighted, she replied:

I like to think that, in the end, my mother always knew what was best for me. It was also what God wanted, since I became a schoolteacher, after all, and not a scientist. But everything turned out to be just fine. (Interview on August 24, 2020)

Maria’s religious interpretation served as an adaptive preference and happiness strategy, enabling her to rationalize and value her circumstances. She perceived her mother’s pressure to alter her career path not as a constraint on her freedom, but as a well-meaning intervention that resulted in a fulfilling, lifelong career. Her happiness stemmed from conformity and deep trust in her mother’s judgment. Ultimately, Maria relinquished her childhood dream of becoming a scientist in favour of this guided choice.

Among the interviewees who had travelled and lived abroad, either for work or to further their educa-

tion, there was a discernible lack of conformity-driven happiness. They described their life circumstances as resulting from choices that they fought to make freely. These interviewees described defying their loved ones for the chance to study abroad and searching for ways to achieve their dreams, often without support. In other words, they seemed to have taken responsibility for their lives and choices regardless of the outcomes.

Conformity-driven happiness was evident in the interviewees' ways of managing stress, anxiety, anger, or disappointment, using psychological comfort as a survival mechanism. Many downplayed their negative emotions and their causes. Alani, for example, had no close friends before college and struggled to communicate with her traditional parents. She coped with loneliness and frustration by trivializing her experiences and convincing herself that everything was fine or that she was overreacting. However, this approach of making light of serious mental health issues trapped her in a cycle of repression, preventing her from addressing and resolving the root causes of her unhappiness. Although Alani conformed to her situation, this conformity exacerbated her problems rather than bringing happiness. For some, this tendency was less about conforming and more about remaining in a familiar comfort zone despite the resulting distress, choosing stability and comfort over the uncertainty of the unknown. Mateo in San José likewise chose positive self-talk as a strategy for coping with life's hardships. Because he loved his career and was very driven, he often berated himself in the past when something did not go his way, or he failed to achieve a certain goal.

Most interviewees said that participation in a group had a direct impact on their happiness, even if the core group consisted of only blood relatives or both family and friends. For one interviewee, his core group did not include full siblings, but did include half-siblings. A core group based on like-mindedness was usually characterized by frequent contact between members of the core group, natural interactions, stable emotional and financial support, and motivation to pursue work and hobbies. Alani, from San José and in her 20^s, found that this conformity was neither helpful nor a source of "real" happiness. Since then, she had acknowledged the importance of speaking to someone about her problems and had come to feel that she was a much stronger person for communicating these issues openly. Having learned through this particular situation that conformity did not bring her happiness but rather painful familiarity, she reminded herself of this experience when she had to deal with

new (potentially uncertain) situations and push forward.

Diego, in his 60^s and from Mexico, claimed that his close relationships with his family, particularly his wife, kept him grounded. Although he had hobbies, such as walking, playing guitar, and reading self-improvement and spirituality books, Diego still believed that his close relationship with his family was his greatest motivator for living a good life. Monica, also in her 60^s and from Mexico like Diego, relied on close family members and friends to talk through stressful and difficult situations.

It should be noted that some interviewees were not necessarily natural people-pleasers with the social skills to form good relationships, but they had learned to form core groups that allowed them to feel appreciated and satisfied in their social relationships. For example, Alejandra, who at the time of her interview was in her final year of college, did not always have a core group. Before college, she worried so much about what people might think of her that she closed herself off from interactions with others. However, she realized that being around people is extremely important and claimed that social connectedness and financial security were important to her happiness. Since graduating and starting work, she and her close friends from college have remained in touch and met frequently. For Diego, a retired Mexican man in his 60^s, some moments were momentous, such as the births of his children or the simple satisfaction he derived from everyday activities, such as exercising or sharing quality time with his wife. Like Diego, Laura, a retired Mexican woman in her 60^s, described happiness in terms of moments that occur in one's life where one feels glad, positive, and joyful. Laura explained:

I feel especially happy when I celebrate any holiday surrounded by family and friends. Other people's company is a significant factor in Mexican people's general feelings of happiness. Most Mexicans would agree. (Interview on August 25, 2020)

A predominant theme throughout the interviews was interpersonal relationships and social activities as key components of perceived happiness. Eduardo, a Mexican interviewee in his late 20^s, agreed on the importance of core groups. He said that, although people in Mexico work long hours, they still make time to get together with family and friends and welcome spontaneous social calls, such as unannounced guests arriving for a visit. Social and religious culture played a significant role in the interviewees' happiness strategies based on conformity. Elena, a Costa Rican in her 70^s,

learned over time not to care about what other people might think about how she lived her life:

If at 70 years old I were still extremely sensitive to judgments made by others toward me as a person and how I choose to live my life, then why have I been alive for 70 years? (Interview on August 13, 2020)

She gained this wisdom and insight into life through experience and over time. When comparing her generation's way of life with that of younger generations, Elena conceded that there are many great advantages in today's world, such as advances in technology and science. However, she felt that the speed at which younger generations live their lives leaves little time for happiness. They are "always on the go" and "are not aware that some things take real effort and patience." She saw the time, effort, and focus young people put into their careers as connected to striving for the newest, best, and most expensive merchandise or technology. Hence, she believed that younger generations would experience greater stress and anxiety from the pressure to keep up with or even outdo their peers.

5 Discussion

This study aimed to build on previous papers that focused on quantitative comparative research on happiness (Atkinson & Scott 2015) by incorporating a qualitative and processual approach (Alacovska et al. 2021). It also sought to develop the capability approach in spatial terms using the concept of spatial capability (Shin 2011), which refers to the freedom to choose in the domains of residence and mobility. The added value of the research was demonstrated in the following results: First, in terms of spatial capability, participants were constrained in housing security and the freedom to be mobile, although young interviewees found living in a big city satisfactory. Spatial capability played a significant role in shaping their overall well-being and self-confidence. Second, throughout their life course, participants learned to move forward and empower themselves by developing happiness strategies and participating in close communities. Our case study demonstrates that conformity-driven happiness is a cultural phenomenon that the interviewees experienced throughout their lives and was vital to their life satisfaction and negotiation capability for happiness. The processual and cultural approach illustrates the mechanism through which individuals' given situations are interpreted, negoti-

ated, and linked to their judgment of their happiness (Smith & Reid 2018).

This study's contributions to cognising happiness as a product of environment and strategy are twofold. First, the qualitative research based on contextual and processual approaches presented in this study extends the discussion on the geographical implications for happiness. The existing geography research that quantifies happiness within the parameters of specific contexts needs to be further developed, which has been started here, to include process-focused approaches. Given that ranking countries based on their happiness quotient is a relatively recent innovation, the concept is still in its early stages. It has yet to evolve fully to consider the more complicated aspects of happiness as a process and the possible impact of material conditions on how people shape their strategies to attain said happiness. This study provides a rich and nuanced analysis of how people in two disparate cities have developed happiness strategies that are similarly based on conformity and reliance on a core group.

Second, this study introduces the capability approach to the field of geography as it applies to spatial and temporal aspects with potential to engender happiness. As the study's focus is on agency rather than the hedonic measurements of a property, the concept of spatial capability explored here contemplates not only the theoretical freedom but the individual's capability to choose their residence and engage in mobility. Since this fieldwork was conducted during the COVID-19 pandemic, this unique temporal context demonstrated how mandates restricting mobility constrained interviewees' spatial capability. The research also illustrated how constrained spatial capability heightened the perception of risk and exacerbated social conditions precipitating increased criminal activity. This study has established that not only the spatial and but also temporal context plays an important role when examining the concept of happiness as an ongoing process and not a static state.

The primary methodological limitation of this study was effectuated by the COVID-19 global pandemic. If daily life under the pandemic was different or more stressful to the study participants compared to their daily lives outside of the pandemic, participants' responses could have been somewhat impacted. Furthermore, given that travel was severely limited or outright prohibited, the authors were compelled to seek an alternative and instead conducted interviews online via Zoom. While this obstacle to traditional qualitative research in fact instigated methodological innova-

tion, the fieldwork lacked some of the liveliness and the sense of connection and place that face-to-face interviews would have provided. With travel restrictions now lifted, accessibility to comprehensive qualitative data would provide a deeper exploration of happiness, spatial capability, and the individual's capability to attain happiness.

6 Conclusion

In this study, we aimed to contextualize the process of happiness creation by considering general capability, spatial capability, and happiness strategies. Online in-depth interviews conducted in Mexico City and San José revealed that the interviewees conceptualized happiness as access to good weather, nature, food, progress, and a meaningful life. The interviewees highlighted constraints in residence and mobility due to crime, traffic, and COVID-19, but found happiness by adjusting their mindsets and participating in supportive groups to gain psychological comfort and life meaning.

The theoretical implications of this research emphasize the link between the capability theory, geography, and happiness. Based on the concept of "spatial capability," this study connects capability with geography. The qualitative research methods we used to explore the associations between geography and happiness helped us contextualize the happiness definitions and factors that emerged from the interview narratives. This study may prompt debate on adaptive preferences and conformity, and we suggest these as areas for future research on happiness. While happiness strategies may limit or expand human capability, the process of developing the capability to be happy is a significant aspect of human progress. The study highlighted that the capability for happiness encompasses human and spatial capabilities, the freedom to make happiness choices, and life strategies involving social support and conformity.

Practically and policy-wise, this study underscores the role of public policies in enhancing people's capabilities and providing support for social groups. Key areas include providing socially secure housing and mobility to expand spatial capability, which is essential for overall human capability. Residential well-being and freedom of mobility should be integral to policy considerations that aim to enhance human happiness and capability. Additionally, the importance of social support, such as that provided by core groups, is highlighted as offering significant opportunities for public policy impact.

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Footnotes

¹ In addition to quantifying countries' GDP, the World Happiness Report attempts to quantify happiness based on socioeconomic factors, such as housing, social welfare benefits, health, life expectancy, crime rates, corruption, and income.

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