



A Qualitative Analysis of the Challenges Facing Expatriates coming to the United States

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Author's Note

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Abstract

In this study, a phenomenological approach was used to gain insight into the perceived challenges encountered by 15 expatriates during a cross-cultural assignment in the Southern United States. The analysis of the data from the semi-structured individual interviews shows six main themes: social support, language ability, cultural difference, knowledge of the environment, openness to change, and adjustment process. Participants noted that social support, ability to communicate effectively and openness helped mitigate the social and cultural challenges experienced. Additionally, findings from this study suggest that participants achieved cultural adjustment over time, and this contributed to higher job performance.

Keywords: cultural adjustment, expatriates, job performance, openness, social support

Introduction

The advances in technology, transportation, and biotechnology continue to foster the emergence of a global economy, which creates business opportunities across nations (Wood, 2010). Although the study shows that the globalization of the marketplace provides advantages for business and non-business entities alike, these benefits do come at a price (Forman & Zacher, 2001). The broadening of the market space has increased the level of competition among organizations operating locally and internationally (Budhwar & Sparrow, 2002). In order, to remain viable and productive in a global era, businesses constantly adopt new strategies to enhance competitiveness in the present marketplace (Black, Gregersen, & Mendehall, 1992; Schudler, Dowling, & Decieri, 1993).

The cross-cultural assignment is fast becoming one of the tools used by many organizations to develop cultural knowledge and increase competitiveness by diversifying business ideas (Black 1988; Caligiuri, 1997; Mervosh & McClennahan, 1997). For instance, the Brookfield Global Relocation Service 2011 survey shows that among several organizations surveyed, the number of employees deployed on international assignments continues to increase

yearly (Brookfield Global Relocation Service, 2012). Research shows that cross-cultural contact leads to the transfer of knowledge, technology, information, art, and culture from one environment to another (Forman & Zacher, 2001; Hannigan, 1990). Despite the values that cross-cultural assignment brings, it remains an expensive venture for both organizations and employees (Hung-Wen & Ching-Hsiang, 2006). Hence, the failure to adjust to the environment during international assignment can lead to financial loss. In most cases, organizations suffer poor performances that result from the expatriate disengagement from the host nation (Takeuchi, Yun, & Russell, 2002; Takeuchi, 2010). Thus, the focus of this study was to gain a better understanding of the challenges and processes that influence expatriate cultural adjustment during the cross-cultural assignment.

Cultural Variances

Cultural differences exist across continents along the lines of uncertainty avoidance, individualism, masculinity, and power distance (Hofstede, 1980). When exposed to environments that are culturally different, one study shows that the tendency for people to experience stress increases (Hofstede, 1984). In the case of an expatriate, who is a person temporarily living and working in a different country (Andreason, 2003), they become exposed to the norms of working and living in the new social and cultural environment. For this reason, Black and Mendenhall (1991) noted that the initial stage of an expatriate assignment is stressful because of the process involved in learning and adapting to the new culture.

General Adjustment

General adjustment refers to the process through which an expatriate becomes comfortable and begins to function with familiarity in the local surrounding (Wang & Takeuchi, 2007). Studies show that prior international experience and pre-departure knowledge of the host community culture significantly relates to general adjustment (Black, 1988; Takeuchi, Yun, and Russell 2002). These investigations discover that expatriates with prior knowledge of the host culture or similar prior international experience tend to adjust faster to the culture and daily life of the host nation. Although evidence clearly shows that prior international experience contributes to general adjustment, the amount of time and the level of general adjustment achieved varies with the level of openness to the new experience that an expatriate exhibits (Shaffer, Harrison, Gregersen, Black, & Ferzandi 2006).

Interactive Adjustment

Interactive adjustment is the ability of an expatriate to adapt to the different communication style in the new cultural environment (Andreason, 2008). Reducing the stress and constraints that come with interactions in situations that are culturally different requires some level of interactive adjustment (Black & Gregersen, 1991; Black & Stephens, 1989). Evidence shows a higher frequency of interaction with people from the host nation leads to interactive adjustment, especially when the expatriate is open to change (Caliguiri, 2000). Despite this evidence, scholars argue that of the three facets of adjustment,() the interactive adjustment is the most difficult to achieve, because, at the point of interaction, the difference in cultures becomes obvious. (Black, Gregersen, & Mendenhall, 1992; Livermore, 2010). Hence,

Andreason, (2008) observes that where there is a huge difference in culture, expatriates tend to experience more challenges in the area of interactive adjustment, which eventually affects job performance. Hofstede and Hofstede (2005) believe that the United States culture is individualistic and tend to differ from most European and Asian culture. This finding is evident in the Brookfield Global Relocation Services survey (2012) which reported the United States as fourth most difficult country for expatriates to achieve interactive adjustment during international assignment (Brookfield Global Relocation Services, 2012).

Cultural Adjustment

Research shows that the greater the difference that exists between the expatriate's culture and that of the host country, the harder it is to experience cultural adjustment (Selmer, 2007; Takeuchi et al., 2002). For instance, Andreason (2008) observed that interpreting people's behaviors and attitudes in a cultural context is difficult, especially in cases where cultures are dissimilar. Additionally, Livermore (2010) discovered that cultural orientation and personality traits influence the interpretations the expatriate gives to events in a cross-cultural setting.

Consequently, the process of cross-cultural adjustment for an expatriate entails learning the culture of the host community and accepting to live with the differences that exist between cultures (McGinley, 2008). The degree to which one achieves cultural alignment in a new environment depends on the individual openness to learning the culture and language (Caligiuri, 2000a; Downess, Varner & Musinski, 2007). As such, there is an increasing body of quantitative research on the subject of expatriates' cultural adjustment (Andreason, 2008; Black, 1988; Black, et al., 1992; Caligiuri, 2000b; Takeuchi, et al., 2002). The majority of these studies focus on American expatriates with a few examining foreign expatriates (Ekta, 2011; Gai, summer, Bragger & Nooner, 2011; Hung-Wen & Ching-Hsiang 2006; Suh & Lee, 2006; Takeuchi, et al., 2002; Yamazaki & Kayes, 2007). Although there are many studies on various aspect of expatriate adjustment, none of these studies examined the process of cultural adjustment from the expatriate's perspective.

When dealing with human experiences, Lichtman (2014) advocates qualitative studies to produce knowledge that helps to comprehend realities and meanings of the social phenomena. Thus, this study used a phenomenological approach (to gain a deeper insight into the perceived cultural challenges encountered by expatriates in the United States. The phenomenological approach helps to fill the gap in the literature by providing the individual's perception and meaning of the cultural challenges experienced as well as the process of cultural adjustment (Merten, 2010). The proceeding sections of this paper present the study method, the findings, the discussion, the limitations of the study and the study implications.

Methods

Participants

The sample for this study consists of 15 expatriates (nine males and six females) from nine countries: Australia, Cameroon, China, France, Japan, New Zealand, Netherlands, Nigeria, and Singapore. The method used to select the study participants was Snowball sampling. Snowball sampling strategy in qualitative research involves using informants to access other people who fit the criteria of interest (Creswell, 2013). Snowball sampling produces a distinct

type of knowledge when used in the study of social systems and networks (Noy, 2008). As such, this study initiated snowball sampling from a chain of personal acquaintances working in the gas and oil sector as well as the hospitality sector. The sample consists of non-managerial expatriates in the fields of engineering, technology, human resources, and client services working and living in the southern region of the United States. Each of these international assignees has two or more years of experience working on the current assignment with ages ranging from 25 to 45 years. Five of the expatriates interviewed have prior cross-cultural experience working on similar assignments in other countries. The study commenced after obtaining Institutional Review Board (IRB) approval and a signed informed consent form from all participants. In line with the ethical requirement, the names used to report the findings in this paper are pseudonyms.

Data Collection

The data collection process involved a six-week period of conducting interviews with participants at public locations convenient to the participants. Data collection was primarily through semi-structured face-to-face interviews. The rationale for choosing this method of data collection was because the phenomenon research is one that is not observable (Patton, 2002). As suggested by Ratner (2002), the semi-structured questions provided a guide for conducting each interview. The interview allowed the participants to share in-depth personal experiences of their adjustment processes in the United States. The interviews occurred in English, and each session lasted about an hour. The participants permitted the use of a digital recorder during the interviews. The use of a digital device allowed for the verbatim transcription of the interviews for later coding.

Data Analysis

The research questions revolve around the expatriates' perception of general adjustment, work adjustment, and interactive adjustment. Based on the research questions, data collected were transcribed and analyzed for themes using a coding technique. Coding involves the process of analyzing data to the point where themes, ideas, and concepts become obvious (Taylor & Bogdan, 1998). One challenge of qualitative analysis is making sense of the massive amount of data collected (Creswell, 2013). To achieve this task, the research questions and the sensitizing concepts guided the coding process.

Using Giorgi's (2009) analytic approach, I listen to the recorded interviews and read the transcript several times to seek similarity and patterns in the way participants answered questions. After the initial coding, I achieved internal homogeneity and external heterogeneity of the themes generated by reading the transcript multiple times. According to Patton (2002), internal homogeneity refers to the degree to which data in categories holds together while external heterogeneity ensures that there is no overlap between groups in the categories. Through the repeated process of listening, reading, and rereading the transcript, the initial categories that developed were refined and emerged as themes (Creswell, 2009).

Four validation strategies enhanced internal validity in this study (LeCompte & Goetz, 1982). First, a positionality statement was introduced at the onset of the study (Merriam, 1998). This process involves presenting information about personal experiences, biases, and prejudices that might influence the study that stems from past work experience (Creswell, 2013). A second validation strategy used was the peer review (Lincoln & Guba, 1985). This entailed regular

meetings and reviews of the study with the research adviser, who is an expert in the qualitative phenomenological method. This process was done to check and ensure that the coding and interpretation of data followed the required procedures rigorously. The third validation applied was a member check (Charlson, 2010). Participants were asked to verify the transcript and findings obtained from coded data. Finally, an audit trail of all the processes used in analyzing the data from the interviews was created. Patton (2002) believes that creating an audit trail helps verify the rigor of data analysis employed and assists in monitoring any self-bias in the data analysis process.

Results

Based on the interviews conducted, the data collected, and the data analysis, six major themes emerged as factors that can influence expatriate adjustment in the United States. The six major themes are social support, language ability, the adjustment process, cultural difference, knowledge of the environment, and openness to change.

Social Support

Repeatedly, the support from supervisors, peers, colleagues, and family was mentioned as an essential factor for work adjustment during the cross-cultural assignment. Participants talked about the various ways that the social support provided helped in dealing with the cultural challenges faced both in social and work environments. There was a strong sense among the expatriates that the approval and support of supervisors and co-workers help to boost confidence and one's overall performance on the job. Joe expresses, how the support from his manager helped him get through the initial challenge of working in a new cultural environment: "Personally, I feel that the reason I was able to cope and perform above expectation is because of the support of the supervisors and colleagues, and the supportive environment helped to reinforce my confidence and ability to function on my job..." In addition, Jeff explains how having the support of other expatriates and the host community at work helps in the early stages of the assignment, especially in understanding the social system: "At the initial stage when I arrived at the country, it was difficult; there were many things I did not understand, but once I started making friends, I could easily navigate things." Similarly, Jean said, "...my friends are a contributing factor in building my confidence to tackle the challenges that come with this assignment." In contrast, some of the expatriates experienced situations at work where the managers and colleagues were not supportive. John states:

I am still not accustomed to this way. I find it difficult- it is all about the managers, and everyone wants to look good in their eyes, even at the expense of colleagues. Where I come from this is not the case; it is one big family at work. I really find it hard to cope with the competition around here. It is extremely hard for me to adjust to this system, and it is affecting my job performance.

Language Ability

Language ability was a theme that resonated among the participants. They emphasized the power of language, and the effect it has on the ability to function socially. Many of the expatriates noted that that the ability to communicate effectively in the language of the host

community facilitates social interaction and supports adjustment to the social system. The expatriates believe that the ability to communicate helps one develop a balanced life at work and in the community. The different experiences of the participants illustrate this concept.

Mary narrates:

In the beginning, it was not easy for me to interact. Although I had a fair knowledge of the language, speaking English was still difficult. Since English was not my first language, sometimes it is hard to express myself in a clear form. It was difficult for me to ask questions whenever I had problems with the job. Going through this motion was extremely stressful physically and emotionally for me.

In other cases, expatriates express that being able to speak the host country's language gives access to social networks. Brianna said, "It is easy for me to socialize with colleagues outside of work because I can keep a conversation going." Mike states that "Speaking to people from around here is easy for me because I speak fluent English; however, sometimes I still need to ask for clarification of certain words."

Cultural Difference

Another challenge the expatriates noted was the cultural difference. Many of the expatriates felt that cultural difference created major barriers that inhibited adjustment. For some of the participants, American culture is extremely different from the culture to which they are accustomed. Mary describes it this way, "I feel I am learning how to live again. Life there is different. It is easier for me to get along with people from my culture because I understand the expectations." Joe talks about the challenge of transitioning from an Asian culture of collective thinking and living to one that expects him to function individually: "The first thing I realize is that people prefer to work on their own. Working this way was hard for me, coming from a society where working in groups was the norm." In a related reflection, Jeff said, "Knowing how to act appropriately in situations was a big cultural challenge." For other expatriates, the difference in culture was minimal. Mike reports that the culture was familiar: "Other than some of the foods around here, the only difference I notice here has to do with people's personality, not the American culture per say." Brianna explains, "There are many similarities between the two cultures; the one difference is that people in my country are very chilled and relaxed while here people are a bit uptight."

Knowledge of the Environment

Most of the participants interviewed noted that as they began to get familiar with the processes at work and the social norms in the environment, their level of confidence in performing the job increased. Hayley for example feels that "...now that I know how things work, my performance has improved to the extent that I now volunteer as a mentor for new employees in my department." For other expatriates, learning to navigate the different areas of social and community life have improved the ability to interact within social networks. This network system provides emotional and mental support in challenging situations. Jean says, "Once you can know your way around, you begin to pick up the clues that help to understand the environment, make friends, and engage in activities that support your total wellbeing."

Openness to Change

Each of the participants reported that the level of openness to the change and the transition into the host environment affects the extent to which they are willing to engage in interacting with the host culture. Some of the participants stated that before accepting the offer to come on the assignment, they were aware of the need to be open to the experience. For example, Ben notes, “Naturally, I am very flexible. I intentionally decided before coming to the United States that I was going to keep an open mind, despite all the cultural changes I knew I will encounter.” Another expatriate shares how the decision to be open and the acceptance of the people and culture allows for easy adaptation to the environment. Sally stated:

As soon as I arrived here, I wanted to engage myself with the people and new culture I was experiencing. I made friends with colleagues who were locals and did not restrict friendship to other expatriates around me. I can tell you for sure, that once you are away from home, the tendency to look for others who are just like you is high, and so, it takes openness to go outside that circle.

Some of the expatriates interviewed expressed the feeling that it is difficult to assimilate into new social networks because of biases toward other cultures. Mary said, “I can’t seem to get along with people from around here. I would rather make friends with people with a similar lifestyle. It has some disadvantages, but that’s alright.”

Process of Adjustment

All the participants stated that cultural adjustment is a process that occurs with time. For expatriates who have spent over two years on a current international assignment, many recorded that they have adjusted into the mainstream of things at their general environment and job. Jean expresses it this way, “I finally adjusted to the system. I understand how the office operates, and I now have friends I hang out with in my free time. It took some time to get here, but now life here is amazing.” Likewise, Juliet explained, “For me, getting used to things around this city took a while...” Some of the expatriates measure the level of adjustment they have achieved with their overall performance at work. Phil illustrates this concept:

I believe that with time I had become better at dealing with issues at work, compared to the initial time when I arrived in the U.S. for this posting. I truly think I have found a middle ground with things, as it is obvious from my last performance evaluation. At the early stages, I never looked forward to performance evaluations because of all the issues raised. In two weeks, I will be due for another performance appraisal, and this time, I do not feel nervous about it.

Discussion

This study examined the perceived challenges encountered by expatriates on cross-cultural assignment in the Southern United States. Findings from this study show that, for most of the expatriates, the adjustment to the change that came because of this experience was gradual and occurred over time. Those participants who have spent over a year on the assignment reported a higher level of comfort in maneuvering through the daily activities in the new location. Typically, the evidence shows that the process of adjustment occurs within the first two

years of deployment for assignees (Takeuchi, Wang & Marinova, 2005). The findings from this study identified several themes that provide useful insight to challenges encountered by the expatriate, as well as the processes that aided the cultural adjustment.

For instance, the expatriates interviewed repeatedly emphasize how the ability to speak and understand the language of the host community helps to foster work and social engagement. Although all participants expressed the need for language ability, participants whose first language was not English faced higher challenges in this area. Many of these participants commented that ability to communicate effectively in the host language was a factor that noticeably influences job performance. This finding is consistent with Selmer's (2006) study that suggested that in an intercultural environment, language is an essential skill required to develop communication and build relationships. Similarly, Shaffer, Harrison, and Gilley (1999) found that an expatriate's ability to speak and comprehend the host language helps to navigate work situations. Participants repeatedly acknowledge that largely, language competency influences the level at which they were able to interact with the host community and develop social relationships in and outside work settings.

Another insightful finding from this study shows that many of the expatriates craved social support. Participants in this study repeatedly stressed the need for support from friends, colleagues, supervisors, and host communities in managing cultural challenges. The participants felt that the supportive environments provided an atmosphere for self-confidence to develop faster. This finding adds depth to Black and Porter's (1991) quantitative study that found that support from supervisors and colleagues facilitates job performances and job satisfaction during the international assignment. The insight provided by participants on the use of social support explains this mediating effect. For example, most of the expatriates interviewed said that the support system creates an enabling environment that allows participants to assimilate into the new work environment, and in turn, improves job performance. The findings from this study seem to suggest that for most of the expatriates, the level of social support craved was higher at the initial stage of the assignment. Participants described how they used the support available at the start of the assignment to facilitate the process that enabled them to gain knowledge of the cultural norms around work and social life in the new environment.

The theme of openness to change emerged as a characteristic that facilitates the expatriate's level of engagement with the host community. Expatriates who were liberal from the start of the assignment and made friends with people from ethnic groups with cultures dissimilar to theirs reported a higher rate of interaction both at work and at social events. This finding is consistent with the literature, which shows that the level of interactive adjustment, general adjustment, and work adjustment is higher for expatriates exhibiting the characteristics of openness (Caligiuri, 2000b; Downess, et al., 2007; Shaffer, Harrison, Gregersen, Black & Ferzandi, 2006). However, the result in all of these studies was determined quantitatively. According to Taylor and Bogdan (2005), the qualitative study fills the gap between data and people's reality in social research. The themes that emerge from the interviews provide in-depth information on the challenges encountered by the expatriates in a cross-cultural setting. Overall, the findings from this study help fill the gap between the empirical data and the participant reality.

Conclusion

The expatriates that participated in this study shared the cultural challenges experienced during the cross-cultural assignment in the United States. While the expatriates acknowledged the advantages of living and working in the United States, there were also challenges in some areas. Notable themes that emerged from the interviews conducted are social support, language ability, the adjustment process, cultural difference, knowledge of the environment, and openness. Based on these findings, it is highly recommended that organizations engaged in cross-cultural operations should consider developing training that will prepare and equip potential expatriates to manage these challenges effectively. Furthermore, the experiences shared might provide vital information that is useful to human resources office personnel, both foreign and domestic, in designing support programs for expatriates.

Study Limitations and Future Research

The study limitation comes from two sources. First, this study used a small sample size, which is appropriate for qualitative study (Patton, 2002). The downside is that the sample may not represent the larger population of the expatriates working and living in the United States. Thus, this might raise questions about the extent to which findings from this study apply to the greater expatriate community within the United States. Another limitation of this study is that the selection of participants was from a single location in the Southern region of the United States. The selection might equally cause some limitations in the applicability of the findings. The use of one location limits the range of expatriate experience captured. It will be interesting to compare the experiences of expatriates working and living in other regions of the United States to that of the participants in this study. A future study with a larger sample drawn from multiple locations would provide findings for this contrast.

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Appendix A

Semi-structure Question Guide

Background Questions

- Is English your first language? NR: (How well do you speak English?)
- What is your age?
- Tell me about where you are from and culture?
- How long is your assignment to the United States?
- Tell me about your reason for accepting this assignment?

Experience Questions

- Before this assignment in the United States, have you had any other expatriate assignments? PR: (Can you tell me more about the experience?)
- Did you receive any pre-departure training before your arrival? PR : (Can you please tell me more about the training you received?)

General Adjustment Questions

- Living in America, what has been your experience with everyday life such as, housing, food, medical, shopping, and cost of living in your new community?
- At the initial time, what was the experience like, navigating things in the new environment? NR: (Do you feel that you have a better knowledge of things now that you have been here for some time?).
- Tell me about the most challenging experience in the adjustment process?
- What has been most helpful to you in adjusting to the living and work conditions in the new environment?

Cultural Adjustment

- Tell me, what are the ethnic backgrounds of the people you have become friends with doing this assignment? Do your friends all share a similar culture as yours? NR: (How different are the cultures from yours?)
- How similar or different are the everyday customs in America from what is followed in your country? NR/PR: (Tell me about some of the differences or similarities you observed between the cultures. Tell me about your experiences in navigating these cultural differences.)
- How accustomed have you become to the social and work culture in America?

Interactive Adjustment

- How would you describe your interaction with host nationals on a day-to-day basis?
- Outside of work, how often do you interact with members of your host community?
- How frequently do you socialize with host nationals? NR/PR: (Do you take advantage of the entertainment and recreational opportunities available in your community?)
- At the initial stage did you feel at ease speaking with host nationals? Why or Why not? NR: (Have your communication with the members of the host community improved over time?)

Work Questions

- As an expatriate, what are your biggest challenges to working in this country?

- Can you identify any accommodation a host employer could make that would allow you promote your ability to do your job better?
- Is there anything more that you will like to share about your expatriate experience that I did not ask about today?

Interpretation of Acronyms

NR: Negative response

PR: Positive response