

**EXPLORING THE EXPERIENCES OF FOREIGN
NATIONALS LIVING AND WORKING IN
DURBAN, SOUTH AFRICA**

By

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DECLARATION

I declare that this dissertation is my own unaided work. All citations, references and adopted ideas have been duly acknowledged. It is being submitted for the degree of Masters of Social Science (Clinical Psychology) in the School of Applied Social Science, University of KwaZulu-Natal, Durban, South Africa. No part of this work has been submitted previously for any degree or examination in any other University.



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ABSTRACT

Globalization has led to increased international mobility, with many people living and working outside their countries of origin. Migration is an extremely complex process that has social, and psychological implications on the individuals or groups undergoing the process. The success of expatriates, that is migrants sent typically by a multinational organization to work in another country, has previously been measured by their organizational outcomes and completion of their assignment. Some losses and damage that result from expatriate failure include: loss of business and productivity, damage to relationships with other employees or customers, as well as the financial and emotional and psychological costs borne by the expatriate and their family. Understanding an individual's experiences during an expatriate assignment can facilitate positive adjustment and increase coping strategies as they work and live away from their home country. Research on expatriates shows the main factors that influence adjustment or contribute to stress are the new culture in the work and social settings, family adjustment in the new country, distance from home and lack of preparation. The aim of this study was to investigate the experiences of expatriates and any coping mechanisms used to adjustment living and working in Durban. This current work followed a qualitative approach, conducting semi-structured interviews with 10 participants. The findings of the present study were generally consistent with previous similar studies. Expatriates reported that factors that made their adjustment challenging, and caused stress, included distance from their home country, family adjustment, uncertainty, and cultural differences. Support systems, previous expatriate experience and personally seeking diverse experiences facilitated adjustment. Unique contributions included how the challenging process of visa application negatively affected adjustment and expatriate's experiences in Durban. The outcomes of this study may contribute towards developing interventions or programs that adequately prepare expatriates and increase the level of psychological support made available to them and their families.

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CHAPTER ONE

INTRODUCTION TO THE STUDY

1.0 Introduction

This chapter gives a contextual and research background of the study. It also includes a description of the research problem and questions the study set out to answer. The chapter also lists the study aim and objectives and ends with an outline of the dissertation.

1.1 Background of the study

Economic globalisation has caused many multinational companies to increase the number of people they send across the globe, often in an effort to advance their global competitive advantage (Krell, 2013; van der Bank & Rothmann, 2006). The Oxford dictionary defines migration as the movement of people to a new area or country for the purpose of finding work or better living conditions (Stevenson, 2010). Due to the unpredictable change migration brings, states tend to divide international migrations into four main categories: (i) temporary labour migrants, (ii) illegal/undocumented migrants, (iii) refugees and, (iv) highly skilled and business migrants, which is the category that expatriates fit into (Castles, 2000; van der Bank & Rothmann, 2006). This study adopts Zhang's (2013) definition of an expatriate. He defines an expatriate as an individual sent by an organisation to manage or cooperate with others on an international assignment for at least six months. Although not all foreign nationals are expatriates, these terms are used interchangeably in this study as the participants studied identified as both. Migration is a major non-normative life transition often accompanied by various stressors that requires significant adjustment to the new surroundings, and can lead to psychological challenges, including anxiety, frustration and hopelessness (Chen & Shaffer, 2018; Dalla, Antoniou, & Matsa, 2009; McClain et al., 2019).

Cross-cultural adjustment is conceptualised as the degree of psychological comfort in a new environment (Black, Mendenhall, & Oggou, 1991; Haslberger, Brewster, & Hippler, 2013; Lee, 2006). This adjustment has been identified as the primary determinant of effective expatriates (Harrison, Chadwick, Scales, 1996). Therefore, it

is important to ensure these employees are adjusting effectively. In the 1980s, Black (1989, 1990) was among the first to understand cross cultural adjustment as a multifaceted construct and identifies three main areas in which individual needs to adjust their behaviour to ensure that they perceive themselves as comfortable in a new environment. The main facets of adjustment as identified by Black (1990) are adjustment to (i) work, (ii) interactions with host nationals, and (iii) the general, which includes issues such as housing, health care and cost of living (Black, Mendenhall & Oddou, 1991; Haslberger, Brewster, & Hippler, 2013; Lee, 2006). Although all three areas are important and interdependent, literature has found that general and interactional adjustments have more of an impact on an expatriate's success than work adjustment, and that individual factors affect these two facets (Black, Mendenhall, & Oddou, 1991; Harrison, Chadwick, & Scales, 1996). This process of adjusting can often be taxing on the individual and the family relocating. There is no unified theory that can predict effects of stress on an individual's performance or ability to adjust (Hancock, 1989). Therefore, in attempting to add to existing research on expatriates' adjustment, this study will be undertaken in an attempt to have an in-depth analysis of individuals' experiences, which may provide a clearer picture of the real challenges expatriates face as well as coping strategies employed to facilitate adjustment in the host country. Exploring the participant's experiences may provide a better understanding of the self-dimension- the individual skill that helps to maintain mental health, psychological wellbeing and effective stress management in light of the international stressors expatriates are subject to on a daily basis.

Broadly conceptualized, stress is said to arise due to an imbalance between the perceived difficulty or threat and the perceived ability to master the threat (Edwards & Freeman, 2021). Stressors have a major influence upon mood, our sense of well-being, behaviour, and health (Brown, 2008; Sadeh et al., 2004; Schneiderman et al., 2005). Stress is not a simple variable but a system of interdependent processes, which mediates the frequency, intensity, duration, and type of psychological and physical response displayed by an individual (DeLongis et al., 1988).

This study focuses on expatriates' lived experiences in the Durban Metropolitan areas, specifically exploring stress and adjustment challenges. Durban was chosen as the study site for three reasons: proximity to the researcher; it is one of four metropolitan areas in South Africa and, one of the strongest municipalities in the country from the

point of view of human and financial resources (Gopal & Ikoye, 2021). This is especially important in South Africa given its diverse population and its economic status which attracts many international companies.

1.2 Research Problem

For many multinational (MNEs) companies, sending people worldwide has become part of their strategic plan to strengthen global competence. Therefore, it is necessary to explore the factors associated with the success of these employees in foreign countries. Expatriate failure can lead to the premature return of an expatriate to his or her home country. However, as Shaffer and Harrison (1998) and Black (1988) indicate, failure may vary in degree and perception. It is therefore important to capture the expatriate's perception of failure, and not only the multinational's perception to ensure their success. Research highlights that expatriates who remain on the assignment but psychologically withdraw may incur indirect losses for their enterprise, given how much these workers cost their respective companies. The full extent of the problem in South Africa is, however, not known, as determining the failure rate, and the reasons for the failure of South African expatriates are predominantly done by research firms on behalf of individual MNEs or particular industries which keep the information confidential (Vogel, van Vuuren & Millard, 2008).

The practice of relocating human capital often costs the company and it is important to ensure the success of the individual's endeavours in their new host country. Although current literature has identified certain characteristics related to success, for example, personality, stress, training, cross cultural and psychological adjustment (Haslberger, Brewster, & Hipper, 2013; Maertz, Takeuchi, & Chen, 2015; Malek, Budhwar, & Reiche, 2015; van der Bank & Rothmann, 2006, Zhang, 2013) the relationship is not causal, meaning there are individual differences and experiences which will determine success. There is need for in depth understanding of the expatriates' experiences in host countries if multinationals are to ensure effective management of these individuals as resources.

The literature on expatriate communities is dominated by studies of migration flows from developing to developed countries causing there to be limited quantitative and qualitative information that reflects the patterns and dynamics of movement of people in or within Africa (Ngwenya, 2010; Madue, 2015; Thela et al., 2017). Ngwenya (2010) adds

that given South Africa's relative economic advancement on the continent, more work should go into investigating what challenges remain for attracting skilled migrants. Migration is not an event, but a process fuelled by different social and individual factors which play a role in how the migrant and the host country respond to the transition (Thela et.al., 2017). In South Africa there is widespread perception that there are flood of illegal immigrants entering and settling into the country (Madue, 2015). This perception, other myths together with the social and economic challenges faced by ordinary South Africans has led to eruption of xenophobic attacks and discrimination of foreign nationals (Hunter & Skinner, 2003; Madue, 2015). Despite the government trying to instil a national identity of social inclusiveness post-1994 (Madue, 2015; Thela et al., 2017), foreign nationals remain marginalized, in fear of crime, afrophobia violence and discrimination (Hunter & Skinner, 2003; Thela et al., 2017). This is especially a threat for African migrants who are seen as posing a direct threat to competing resources for ordinary South Africans.

Research done on migrants in South Africa, particularly refugee and unskilled labourers shows there is a high proportion of mental distress, particularly depression, anxiety and post-traumatic stress disorder (Vogel et al., 2008). Expatriates may not be exposed to the same challenges and traumas as refugees or unskilled migrants in South Africa given their higher socio-economic status. They, however, are not immune to the emotional and psychological distress during adjustment to language barriers, cultural stress and social rejection (Bhugra, 2004; Thela et al., 2017) commonly faced by migrants. Exploring the experiences of expatriates and the factors associated with their adjustment can contribute to better individual and community adjustment.

1.3 Aim of the study

The aim of the present study was two-fold. The first aim was to investigate the lived experiences of expatriates living and working in Durban. The second aim was to report any coping mechanisms that were employed by the participants to aid the adjustment process. These aims informed the research objectives listed below.

1.4 Research objectives

The current study assumes that expatriates may experience differing levels of stress and therefore seeks to explore the stressors involved and how they affect adjustment of the individual.

The objectives of the study are:

1. To explore how foreign nationals adjust to working and living in Durban.
2. To identify and explore stressors experienced by foreign nationals working in Durban.
3. To understand the relationship between stress and adjustment challenges experienced by foreign nationals working in Durban.

1.5 Research questions

The research questions of this study are:

1. How do foreign nationals adjust to living and working in Durban?
2. What are the stressors that foreign nationals working in Durban experience?
3. What is the relationship between stress and adjustment challenges experienced by foreign nationals working in Durban?

1.6 Outline of the dissertation

This thesis comprises of six chapters which are summarized below:

Chapter 1- Introductions: this section introduces the study, providing a detailed background and the research problem being studied. The chapter also includes the study's aims, objectives and research questions that guided the research.

Chapter 2- Literature Review: this chapter presents a broad conceptualization of stress before narrowing down on expatriate stress and adjustment and factors that contribute to this. It also highlights the theoretical framework employed throughout the study

Chapter 3- Methodology: the chapter outline the research approach used including the research paradigm and design, participant selection, data collection and its analysis, trustworthiness, reflexivity and ethical considerations of the study.

Chapter 4- Presentation of findings: In this chapter, the study data is documented and grouped into themes based on similarity.

Chapter 5- Discussion: This chapter discusses the study findings giving interpretations based on prior similar research and the theoretical framework chosen

Chapter 6- Conclusion: The final chapter concludes the work by giving a summary of the study, its limitations and recommendations for future research.

CHAPTER TWO

LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.0 Introduction

The chapter begins with a broad examination of the process of adjustment by expatriates before narrowing down on the factors associated with expatriate stress and adjustment. A brief conceptualization of stress is included before narrowing down to the theoretical framework chosen for this study - Lazarus' theory of stress.

2.1 Conceptualization of expatriate adjustment

There is a growing interest in workplace well-being, not just for expatriates indicating a paradigm shift in acknowledging how society treats workers health (Bennet, Weaver, Senft, & Neeper, 2017). According to Anderson (1994), an expatriate is a person who lives or works outside of his or her own home country on a non-permanent basis. The word expatriate in this study will be used in reference to persons who have been sent to work and live abroad; this is as opposed to other types of migrants, for example, refugees. Expatriation often requires relocations of the employee and in some instances, their family to a new country therefore transition and adjustments are common leitmotifs in the expatriate discourse. This study chose to focus on this particular group of foreign nationals as they are not considered a sensitive population of foreigners in South Africa in comparison to, refugees for example, thus making them easily accessible.

Adjustment

Adjustment can be construed as “attitudes toward the host culture, physical health, feelings of acceptance and satisfaction, nature and extent of interaction with host nationals, acquisition of culturally acceptable skills and behaviours, professional performance, and mental health” (Jenkins & Mockaitis, 2010). The concept of adjustment is further said to have its provenance in the field of psychology. In the *Dictionary of Behavioural Science*, adjustment it is defined as: “1) a harmonious relationship with the environment involving the ability to satisfy most of one's needs and meet most of the demands, both physical and social. 2). The variations and changes in behaviour that are necessary to satisfy needs and meet demands so that one can establish a harmonious relationship with the environment” (Selmer & Luring, 2011).

The concept of expatriate adjustment has been widely researched in literature. Black (1988) notes that “expatriate adjustment during a foreign assignment may be viewed as subjective, accounting for the level of psychological comfort an individual experiences in a new role, or objective, accounting for the degree to which an individual masters new role requirements and the degree to which one feels adjusted to those requirements” (McClain et al., 2019). Selmer and Luring (2011) also identified five dimensions of the adjustment process a) pre-departure training which often includes cross cultural training, b) previous overseas experience: having lived in a foreign country) organizational selection mechanism: d) individual skills: e) Non work factors refers to other personal attributes like family and spouses that enables or aids with the process of adjustment.

Lee and Sehoole (2015) analyse a theory that describes adjustment occurring in four stages: (i) honeymoon phase marked by initial excitement of being in a new country, which is short lived and followed by (ii) culture shock which often leaves the expatriate feeling irritable and hostile (iii) the novelty of the new culture begins to wear off and an overly focus on the differences between the new culture and the expatriate’s home culture make making small inconveniencies to be viewed as major catastrophes (iv) after culture shock, in the third period- gradual adjustment, the employee begins to feel comfortable and adjust to the new culture’s logic and values eventually leading to the fourth stage- adaptation.

In a more thorough analysis of the adjustment to expatriation periods, it can be noted that one of the most complex is the adjustment period which consists of the following three levels: (i) adjustment to the general environment (to the recipient country’s cultural environment, for instance, weather, food, living conditions); (ii) adjustment to the work situation (related to psychological adjustment to different work standards, expectations, and evaluation); (iii) adjustment to the interaction with the recipient country’s citizens (to a different communication style, other communication and cultural differences (Anderson, 1994; Hunter & Skinner, 2003).

The Table 1 gives a visual summary of the representation of the different conceptualizations of adjustment existing in the international relocation adjustment literature mentioned by Jenkins & Mockiatis (2010). The table highlights the three dimensions of subjective well-being, social functioning, and health that pervade adjustment literature.

Table 1: Conceptualization of Adjustment existing in the International Relocation of Adjustment Literature

Conceptualization	Category
Satisfaction Feeling of acceptance Positive attitude towards host country Perceived psychological comfort Successful reinforcement substitution	Subjective well-being
Cross-cultural effectiveness Effective interpersonal functioning Nature and extent of interaction with host nationals Acquisition of culturally acceptable skills and behaviour Professional performance	Social functioning
Mental health Somatic health	Health

Source: Jenkins and Mockaitis, (2010) Journal of Human Resource Management 21 (15).

A comprehensive background on theories of expatriate adjustment is however beyond the scope of this paper as the study rather focused on factors that contributed to stress, or lack thereof, following adjustment. The following section will discuss various factors identified in literature as contributing to effective adjustment and those identified as stressors.

2.2 Factors associated with Expatriate Adjustment and Stress

The growing number of expatriate workers and the concomitant linguistic, cultural, location and climatic challenges that these expatriate workers have been identified as facing gave a rise to a lot of scholastic studies. Most of these studies try to understand how these identified challenges affect the performance of these expatriates and the different coping mechanisms that these expatriates have come up with (Chen & Shaffer, 2018; Edmond, 2002; Vijayakumar & Cunningham, 2019; Zhu et al., 2016). Tahir & Chamas (2019) analysis for instance delved into the relationship between the

family flexibility of expatriates and their cross-cultural adjustment. They also assessed the different stressors experienced by these expatriates, their spouses, and children during the international transition.

Trompetter et al. (2016) research analysed how family dynamics of expatriate workers contributes to their stress and adjustment level. These scholars firstly established that in accepting international assignments, most expatriates are reluctant to relocate their family. While the results of their survey of respondents show that a difficult location, cultural adjustment and language still remain the greatest challenges, other common reasons for expatriates to turn down international assignments were further underscored. According to these scholars, 83% of the respondents cited family concerns as one of the major reasons to turn down an international assignment and a reason that creates a lot of stress for these expatriates.

In addition, Trompetter et al. (2016) examination importantly established that “47% of the expatriates that accepted overseas assignments took their spouse and children along with them, a percentage that was found to be significantly decreasing in the past years. One of the primary reasons for this decrease has been the lack of organizational support for family members, including spouses and children (Tahir & Chamas, 2019). These authors through empirical evidence went on to conclude that family characteristics play an important role in mediating the expatriate’s adjustment process. That is to say, while an expatriate on his/her own may cope with some of the stresses that come with moving into a different country, the ability or inability of their families to cope with such creates further stress for the expatriate. A similar assertion is made by Black et al (1991, pp. 295) that an “expatriate may possess the necessary skills for successful international adjustment, [but] if his or her spouse does not possess the same skills, an aborted assignment may ensue because the spouse or family members cannot adjust to the new culture”.

Another equally important theory that examines the role of family in aiding or contributing to the stress and adjustment process of an expatriate is the *Family Systems Theory*. Central to this theory is the view that a family is a unit made up of members who are interdependent. The Family Systems Theory lends credence to the argument that the importance of family in the cross-cultural adjustment process of an expatriate

cannot be underemphasized. To put this argument in context, Chen and Shaffer (2018) analysis makes a comparison of the model of marital and family systems to measure family characteristics and three other different tools: the Satisfaction with Life Scale by Pinto (2010), the Sociocultural Adaptation Scale (Sarkiunaite & Rocke, 2015), and the Acculturation Index (Armes & Ward, 2001) to assess cross-cultural adaptation. Essentially, Arthur and Bennett's (1995) findings expressed "that balanced cohesion, balanced flexibility, and disengagement (low cohesion/low flexibility) were the best predictors of sociocultural adaptation" (Chen and Shaffer, 2018).

Selmer and Luring (2011) view stress and adjustment to be interlinked. Their argument is hinged on the supposition that the ability or inability of an expatriate to learn a host country's language affects their level of adjustment. That is to say a difficulty to learn a language may lead to more stress and further make adjustment difficult. It is tenable to suggest that language difficulty can be cited as another contributor to expatriate stress. According to Selmer and Luring (2011), "language proficiency, familiarity with cultural differences, values and norms are seen as cornerstones of expatriate adjustment with language itself being a crucial instrument by which expatriates develop their understanding of the new culture"

A similar view is expressed in Krell (2013) as he identifies the difficulty of learning a language as a stressor. Without explicitly employing the use of the term stress, his nuance however suggests such. According to Fukuda & Chu (1994) language problems serve as a major source of frustration, dissatisfaction, and friction between expatriates and their host country colleagues. There is the inherent view that the inability of an expatriate to learn a host country's language can lead to exclusion from social and work-related activities/interactions (Brown, 2008) and further a sense of isolation which can be another trigger of stress.

An investigation of US expatriates in France by Konopaske and Werner in 2005 established a different but correlating view to Brown (2008); it was found that there is a satisfaction derived from proficiency in the host country language. Proficiency in the host country's language positively correlates with expatriate satisfaction, family satisfaction, and anticipated duration of stay, which may in turn influence the extent of socio-cultural expatriate experience.

Working environment has been described as another important trigger of stress for an expatriate. Literature suggests that substantial empirical evidence exists to show that psychosocial risk factors at work can cause undesirable physiological conditions (e.g., gastrointestinal malfunction, cardiovascular morbidity, and mortality) and further lead to psychological responses (e.g., anxiety, depression, and burnout) among employees (DeLongis, 1988).

One of the most salient points that run across literature is the widely established fact that the process of transitioning for an expatriate is a demanding process (Fukunda & Chu, 1994; Krell, 2013).

Literature mentions the significant economic and social costs are associated with the failed adjustment of expatriates (Brown, 2008; Fukunda & Chu, 1994; Krell, 2013; Vogel et al., 2008). Expatriate failure can be defined as the premature return of an expatriate (i.e., a return home before the period of assignment is completed (Edmond, 2002). This include both financial (costs) and non-financial risks (reputation, brand and talent) for the company as well as personal costs for the employee, e.g. reduced self-esteem after failure of an assignment (Trompetter, Bussin, & Nieraber, 2016).

So far, this review of literature's conceptualization of adjustment can be described as a process that is affected by both extraneous factors (sociocultural) and subjective response (individual cognitive abilities). While the role of sociocultural factors cannot be overemphasized in understand how expatriates adjust to a new environment, subjective response however plays an important and optimal role to. The line of reasoning here is that individual choice determines how well or not an expatriate adjusts. As Anderson (1994) affirms, empirical evidence indicates that the ability to adjust both psychologically and sociocultural in cross-cultural situations hinges on individual ability. A similar view is shared by Armes and Ward (2001) as they concur that while several factors come into play in understanding expatriate cross-cultural adjustment; understanding individual differences provides a more assured route to understanding how expatriates adjust well in different socio-cultural environments. Individuals with a performance orientation might quickly come to understand that there is much to learn in a new cultural context and therefore be primed to adjust their

approach to the new situation (Arthur & Bennett, 1995). For Konopaske and Werner (2005), “conscious efforts at adjustment occur because expatriates realize that they cannot— in their own eyes or in the opinion of relevant others—fully meet the demands raised by the move to another country, or that aspects of the move do not meet expectations. This creates a subjective need to change”.

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There is also an important supposition that adjustment is not measured by how an expatriate conforms to the host country’s culture. But it is measured instead in terms of variables such as comfort or satisfaction with the new environment, attitudes, contact with host nationals, or difficulties with aspects of the new environment (McClain et al., 2019).

2.4 Theoretical framework- Conceptualizing Stress

Broadly conceptualized, stress is said to arise due to an imbalance between the perceived difficulty or threat and the perceived ability to master the threat (Edwards & Freeman, 2021). While the use of “perceived” indicates the subjective nature of stress, Schneiderman et al. (2005) suggest that such a conceptualization of stress indicates a strong emphasis on the objective nature of stressful situations. DeLongis et al. (1988) conceptualize stress as “a reaction to the environment, in which there is either a) the threat of a net loss of resources, b) the net loss of resources, or c) the lack of resource gain following the investment of resources”.

Given the above, Bhaskar-Shrinivas et al., (2005) describe resources as “any object, personal trait, condition or energy that is of value to an individual and serves as a means of helping individuals to realize their goals and to gain control over their environment”. One extrapolation that can be made from both Bhaskar-Shrinivas (2005) and Sarkiunaite & Rocke’s (2015) conceptualization is the affirmation that the availability of the above cited resources (personal traits, energy etc.) are tied to a person’s socio-cultural trait. To put in context, an expatriate from Swaziland would certainly have less stress learning the local language (e.g. isiZulu) needed for work and in most cases out of work interactions in KwaZulu-Natal. This is due to the fact that the language (SiSwati) has uncanny similarities to isiZulu. Put in another way, language/culture would not pose as a stressor to an expatriate from Swaziland as opposed to an expatriate from West Africa. Language/culture can thus be said to be an

objective stressor for a West African expatriate (Gopal & Ikyoive, 2021) in South Africa irrespective of the individual's abilities.

2.5 Lazarus' Theory of Psychological Stress

Schneiderman et al. (2002) made the submission that there were two central psychological theories of stress. There is the *appraisal*- individual's evaluation of the significance of what is happening for their well-being, and *coping*, i.e., individuals' efforts in thought and action to manage specific demands. The major connotation found in Lazarus' theory of stress is the view of stress in relative terms. In this connotation, stress is not construed as a specific kind of external stimuli or a definite pattern of physiological, behavioural, or subjective reactions. Stress is instead construed as a relationship ('transaction') between individuals and their environment (Vogel et al. 2008).

For Selmer & Lauring (2011), stress is defined as a particular relationship between the person and the environment that is appraised by the person as taxing or exceeding his or her resources and endangering his or her wellbeing. Intrinsically, this view connotes stress not as the objective demands and response capacity of a person but rather as the way these factors are perceived (Schneiderman et al. 2002). Essentially, this view suggest that psychological stress is a relationship with the environment that the person assesses as significant for his or her well-being and in which the demands tolls or exceed available coping resources (Schneiderman et al. 2002).

As a cognitive and transactional model of stress, Lazarus' view proposes that stress does not reside in the person nor the environment, but in the interaction between the two (Peberdy, 2001). This model thus advocates two processes as central mediators within the person-environment transaction: *cognitive appraisal* and *coping* (Richardson & Mallon, 2005). Appraisal in this model of stress is key to understanding stress related transactions. According to Richardson & Mallon,

“This concept is based on the idea that emotional processes (including stress) are dependent on actual expectancies that persons manifest with regard to the significance and outcome of a specific encounter. This concept is necessary to explain individual differences in quality, intensity, and duration of an elicited

emotion in environments that are objectively equal for different individuals. It is generally assumed that the resulting state is generated, maintained, and eventually altered by a specific pattern of appraisals. These appraisals, in turn, are determined by a number of personal and situational factors. The most important factors on the personal side are motivational dispositions, goals, values, and generalized expectancies. Relevant situational parameters are predictability, controllability, and imminence of a potentially stressful event (Richardson & Mallon, 2005 pp 5)."

Lazarus (1966) further suggests that there are two basic forms of appraisal. They are the a) primary appraisal which speaks to concerns as to whether something of relevance occurs to the individual's wellbeing and b) secondary appraisal which refers to the coping options available to the individual. In *primary appraisal*, there are other three components which are: 1) *goal relevance*: This describes the degree to which an encounter addresses issues that an individual cares about. 2) *Goal congruence*: describes the degree to which the needs, demands, goals, and structures of the situation are consistent with the needs, demands, goals, and structures of the individual by the individual. 3) *Type of ego- involvement* defines facets of personal commitment such as "self- esteem, moral values, ego-ideal, or ego-identity" (Lincoln & Guba, 1986). According to Lazarus (1991), appraisals of individuals or environmental transactions integrate two types of forces: environmental factors, such as demands and resources and an individual's personal agenda, including their values, goals, and beliefs

Similarly, three *secondary appraisal* constituents are distinguished: "*blame or credit* results from an individual's appraisal of who is responsible for a certain event. By *coping potential* Lazarus means a person's evaluation of the prospects for generating certain behavioural or cognitive operations that will positively influence a personally relevant encounter. *Future expectations* refer to the appraisal of the further course of an encounter with respect to goal congruence or incongruence" (Krell, 2013).

Coping in Lazarus' theory simply refers to "an individual's efforts to manage the psychological demands of any environment that is straining this individual's resources (Lee & Schoole, 2015).

Krell's (2013) reading of Lazarus suggest that "*Coping* is intimately related to the concept of cognitive appraisal and, hence, to the stress relevant person-environment transactions." According to Konopaske & Werner (2005), coping is defined as "the cognitive and behavioural efforts made to master, tolerate, or reduce external and internal demands and conflicts among them". In chapter 5 of this study, an extensive application of Lazarus' theory will be used to analyse and interpret data gathered.

Lazarus and Folkman's (1984) transactional theory of stress and coping, described above, focuses on coping processes that directly modify stressors and mitigate emotional distress arising from negative transactions. Subsequent research shows there is a simultaneous existence of positive and negative emotions in the stress process, even during the direst circumstances thus need for the transactional theory to evolve (Folkman and Moskowitz, 2004). The revised theory proposed that unsuccessful coping and the distress that results can trigger meaning focused coping, that is, drawing on one's beliefs and values, to reorder priorities and assign positive meaning to events and find benefits of stress (Folkman, 2008). In later years, Lazarus's theory of stress evolved, citing that stress, emotion and coping should be viewed as part of a whole relationship (Lazarus, 2006).

Jasinskaja-Lahti and Yijälä (2011) applied the Lazarus theory of stress to study stress in migrants planning to move from Russia to Finland. Their results show that it was the participants' expectations that is, their appraisal of adaptation during migration that resulted in increased stress levels (Jasinskaja-Lahti & Yijälä (2011).

This study finds Lazarus' theory suitable for its analysis because as argued in the course of this chapter and in the review of literature, the idea of stress is quite linked to the notion of adjustment. And an important component of being an expatriate is a need to adjust to a different socio-cultural environment. So while the first part of Lazarus' theory enables us to understand how an individual, in this case an expatriate worker evaluates the significance of what is happening in their life in a new environment; Lazarus' concept of coping is tied to this study's understanding of adjustment as the efforts an expatriate makes in "thought and action" to manage the specific demands that comes with their new environment.

2.6 Conclusion

The chapter began with a broad conceptualization of what adjustment is, the factors that contribute to expatriate stress, and how the topic pervades a variety of literature on expatriation. The trajectory adopted by this study in its analysis of literature is such that there is an understanding of the difficulty of moving into a different sociocultural and geographic environment. The chapter covers the theoretical framework adopted-Lazarus' theory of stress which highlights the relative nature of stress. This theory suggests that stress is a result of how one interprets their environment rather than a response to an external objective stimulus. The next chapter will detail how the data was collected using qualitative research methods suitable for this study

CHAPTER THREE

METHODOLOGY

3.0 Introduction

This section provides an overview of the research methodology. The chapter begins with a description of the research paradigm that this study falls in, followed by the qualitative research design adopted and participants' selection and recruitment process. This chapter also includes the data collection method, procedures followed, instruments used as well as how the data was analysed. The four criteria of research trustworthiness and how this was applied in this study is indicated. The chapter closes with information about the researcher's reflexivity and ethical considerations of the study.

3.1 Research paradigm

Thomas Kuhn, an American philosopher was the first to use the term paradigm to mean a philosophical way of thinking (Kivunja & Kuyini, 2017). A paradigm can be simply understood as a way of looking at the world, or a set of assumptions that guide thoughts and actions. In research, the term paradigm is used to describe the researcher's worldview, that is, the perspective, or thinking, or set of shared beliefs, that informs the process of collecting research data and its meaning or interpretation (Khaldi, 2017; Kivunja & Kuyini, 2017). There are four dominant research paradigms, summarised in Table 2 below. Paradigms differ in four key elements: ontology- nature or essence of the social phenomenon being investigated (Scotland, 2012); epistemology-how we know truth; methodology- the logic and flow of process followed when conducting research and; axiology- the ethical issues that need to be considered when planning research proposal (Kivunja & Kuyini, 2017).

This current study falls within the interpretivist/constructivism paradigm. The aim of this paradigm is to understand the subjective world of human experiences (Guba & Lincoln, 1989). Interpretive social science is concerned with how people interact and views humans as social beings with meaning and norms implicit in their actions and thinking (Probst, 2015). Research within this paradigm, such as qualitative research

makes every effort to try to understand the viewpoint of the subject or participant being observed, rather than the viewpoint of the observer or researcher (Kivunja & Kuyini, 2017). This is in line with the current study as the goal is to understand the expatriate as an individual and their interpretation of the world around them.

Table 2: Labels commonly associated with the Four Dominant Paradigms

<i>Postpositivism</i>	<i>Constructivist</i>	<i>Transformative</i>	<i>Pragmatic</i>
Experimental	Naturalistic	Critical theory	Mixed methods
Quasi-experimental	Phenomenological	Neo-Marxist	Mixed models
Correlational	Hermeneutic	Feminist theories	Participatory
Causal comparative	Symbolic interaction	Critical race theory	
Quantitative	Ethnographic	Freirean	
Randomized control trials	Qualitative	Participatory	
	Participatory action research	Emancipatory	
		Postcolonial/indigenous	
		Queer theory	
		Disability theories	
		Action research	

3.2 Research design

This study adopts a qualitative research design which falls within an interpretive social science approach to research (Polit & Beck, 2014). Creswell (2009, pp 4) defines qualitative research as “a means for exploring and understanding the meaning individuals or groups ascribe to a social or human problem.” The qualitative research approach allowed for data to be collected in the participant’s setting and analysed by inductively building general themes which the researcher used to make interpretations of the meaning of the data

This study specifically assumes a phenomenological approach to qualitative research. According to Lincoln & Guba (1986), the aim of phenomenology is to understand concrete lived experiences, narrated by the individuals that have lived them. This approach best suits the research problem as it allowed for the use and analysis of the subjective experiences and participants perceptions, along with the opportunity to explore their experiences of adjusting to living and working in Durban. The approach enabled the researcher to delve deeper into the lived experiences of the participants

being studied (Makawandwa & Vearey, 2017) thus, enhancing the exploration of meaning and experiences attached to being an expatriate.

3.3 Participants

This study's sample population was expatriates who at the time of conducting research were living and working in Durban. The study sample selected consisted of ten (N=10) expatriates; five male and four female participants. The participant's demographics are presented in the table below

Table 3: Participants' Demographic Information

Participant	Sex	Age	Marital status	Number of children	Expatriate experience	Country of origin
1	M	38	Married	3	3 years	Nigeria
2	F	48	Married	2	21 years	Burundi
3	M	43	Married	2	6 years	UK
4	F	34	Married	1	3 years	UK
5	F	40	Single	0	14 years	USA
6	F	49	Married	3	9 years	USA
7	M	39	Divorced	2	6 years	Sierra Leone
8	F	44	Married	1	11 years	UK
9	M	54	Married	0	5 years	Australia
10	M	52	Married	3	15 years	Poland

3.3.1 Selection of participants

Participants in this study were selected using a non-probability sampling technique, specifically, the snowballing technique. This method was appropriate given the access

snowballing sampling provides for in depth investigations of selection of participants that are uniquely informative (Creswell, 2009). This technique was chosen for its suitability for qualitative psychological research and especially for natural interactional dynamic moments (Khaldi, 2017). Furthermore, expatriate workers are likely to know each other from their social or occupational networks therefore snowballing was appropriate in recruiting individuals as it relies on interconnected networks.

This qualitative sampling technique permitted the researcher to select participants from the sample population who were appropriated and fit the sample description and the inclusions and exclusion criteria.

a. Inclusion criteria

An expatriate worker, that is one who's move to Durban was initiated by an organization sending them here on a work assignment

Lived and worked in Durban for a minimum of six (6) months

b. Exclusion criteria

A self-initiated expatriate, that is, an individual who is self-employed or whose move to Durban was self-initiated

Living and working in Durban for not more than six (6) months

3.3.2 Recruitment Procedure

The participants were recruited via the researcher's social and familial networks. Any interested individuals had to consent for their contacts to be shared by the referee to the researcher. Thereafter, a group email was sent¹ as part of the recruitment process. Three participants responded to the email expressing interest in participating in the study. They were consented² and interview date, time and location was scheduled depending on the availability and convenience of the participant. Once the interview was completed, the participants were asked to refer anyone they knew who fit the inclusion criteria of the study. No participant was excluded based on their sex, age, ethnicity or disability.

¹ Appendix C holds the Invitation to participate in research letter.

² Appendix D contains the Informed Consent Letter.

All the interviews were conducted by the principal researcher- a postgraduate student who completed this present study for her Master of Social Science (Clinical Psychology) dissertation. The data for this study was collected between January and June 2018.

3.4 Data collection method

In order to gather an in-depth qualitative understanding of the expatriates' experiences, data in this study was collected using semi-structured in-depth interviews. The face-to-face in-depth interview method was selected as it allowed for the collection of rich and thick descriptions of the interviewee's life as well as the opportunity to observe social cues which added depth to the responses given by participants (Majid et al., 2017). This method provided synchronous communication of time and place, allowing the researcher to pay attention to the answers provided as well as contextual cues such as body language and tone of voice. Khaldi (2017) recognises that the semi structured approach allows for additional questions and exploration of other themes that may emerge from the dialogue. This was especially important in the present study, to make sure the individual's perspective is accurately captured and ensuring there is consistency in all interviews (Lincoln & Guba, 1986).

3.5 Data collection instruments

Researchers using qualitative methodologies immerse themselves in a culture, group or environment in the various ways, such as, observing people and their interactions, participating in activities, interviewing key people taking life histories, case studies or analysing cultural artefacts (Tubey et al., 2015). Given the participatory nature of qualitative research, there were two data collection instruments considered for this study: the researcher as the primary instrument and the interview guide developed.

3.5.1 Researcher as key instrument

The level of involvement of a qualitative researcher thus placing them as the instrument in qualitative data collection is generally acknowledged (Pezalla et al., 2012; Rubin & Rubin, 2005). It is through a researcher's facilitative interaction that a conversational space is created, one where participants' feel safe to share their experiences and world views (Pezalla et al., 2012). Being aware of this, the researcher of this study adopted the following recommendations (Stewart, 2010) to prepare for data collection:

Continually revisiting previous findings and interpretations- the researcher made sure to constantly review literature on expatriates, stress and adjustment throughout the entire research process that is, from idea conception, proposal writing to final data collection. This was done to address any assumptions the researcher may hold about the topic being investigated.

Transparency in knowledge of key concepts- Beyond initial interest in this study's topic, the researcher was not an expert in this field. The researcher sought to equip herself with knowledge through supervision and actively researching literature. Qualitative research is always evolving, and it was with this view that the current research was undertaken- to add to existing literature.

Authenticity in interactions- Lincoln & Guba (1986) name fairness as an authenticity criterion through which researchers acknowledge their perceptions, knowledge and beliefs. Maintaining regular supervision visits during the data collection process ensured the researcher's focus was on the participants' views. The researcher also leaned into her own identity, as a young, black foreign national who moved to Durban as a family member of an expatriate. The use of this identity and the process of reflexivity is discussed later in this chapter.

3.5.2 The interview guide

An interview guide was developed for use in the semi-structured interviews. The questions included in the guide³ were generated after a literature review on this subject was conducted and gaps in knowledge as well as common factors affecting expatriates were identified. The tool provided the interview with structure but also allowed the researcher flexibility to probe or ask additional questions for clarity or further depth of understanding. The interviews were approximately 30 minutes long, to yield sufficient data. Three interviews (N=3) lasted for approximately 45 minutes, as the participants had been expatriates for a lengthy period and had a wealth of information. Since the consent form indicated that the interview would take 20 minutes, if the interview was not over at the 20-minute mark, the participant was notified and given the option to terminate. All participants chose to proceed answering all interview questions.

3.6 Data Collection Process

Prior to commencement of this study, a comprehensive research proposal was presented to the research supervisor for discussion and refinement of the topic.

Thereafter the proposal was submitted to the Humanities and Social Sciences Research Ethics Committee at the University of KwaZulu Natal. The study received full approval-HSS/2171/017M⁴. During preparation for the study, two pilot interviews were conducted with two male individuals who had relocated to Durban on expatriate assignments but have since transitioned to permanent residents of South Africa. Piloting for interviews is an integral part in the process of conducting qualitative research as it highlights any areas that need improvisation in the major study (Majid et al., 2017). The purpose of conducting the pilot interviews was to gather information that would further refine the interview guide and the data collection process prior to collecting study data. Following feedback from the pilot participants, revisions made included the changing the arrangement of the questions and providing more information about the study and its purpose to participants before commencing with the interview questions. The data gathered during the pilot interviews was collected purely for feedback purposes and not included in the analysis.

Once piloting was complete, the researcher went ahead with formal data collection. An email was sent to the researcher's networks with a recruitment letter which included information about the title of the study, the purpose and duration of the interview as well as their rights as participants. Three participants responded to the email and provided their telephone contacts whilst expressing interest in the study. These participants were contacted over the telephone and interview dates and times scheduled. A day before the scheduled interview the participants were sent an SMS or email, according to their preference, reminding them of the interview date, time and location. It was acknowledged that English is not the first language for some participants therefore during the phone call they were asked to indicate if they were comfortable with the interview being conducted in English. Before the start of each interview, the researcher introduced herself as a master's level student at UKZN, conducting the research as part of the university's requirements for degree completion. Thereafter the participants were handed a hard copy of the informed consent form and given a few minutes to read. Before the participant signed the form, the research reiterated that participation was voluntary and that they could withdraw at any moment, without any penalty.

⁴ Appendix A indicates ethical approval while Appendix B shows amendment approval. Appendix E contains the Interview guide.

They were also reminded that all information they gave was confidential, and measures would be taken to protect their identity, such as giving each one a unique participant ID. The researcher requested for permission to audio record the interviews, and asked the participants to indicate that they agreed by checking the box in the informed consent form before signing. Once the form was signed, the interview began with gathering basic demographic information before proceeding to the set interview questions. This ensured the accuracy of the information obtained and the researcher was also able to establish good rapport with the participants without being preoccupied with note taking. After each of the three interviews were completed, the participants were asked to refer anyone they knew who fit the inclusion criteria, and the same process was repeated for all participants.

All interviews were audio recorded and conducted in English as this was the most comfortable language for the expatriates. Participants did not receive any compensation for their participation; however, refreshments were provided during the interviews.

Provisions were made to meet participants at a location of their convenience and all chose to conduct the interviews either at their home or workplace. This guaranteed a private and safe environment, allowing the participants to be comfortable during the interview process.

3.7 Data analysis

The data collected was analysed using thematic analysis, following the method described by (Braun & Clarke, 2006). Thematic analysis was selected as the preferred method because it is a widely used method in qualitative research. Thematic analysis helps to organise, interpret, and make sense of data gathered (Braun & Clarke, 2006; Maguire & Delahunt, 2017). This approach was selected as it is viewed as the most influential, clear and provides a good framework of the data (Maguire & Delahunt, 2017). The analysis followed six phases:

Phase one: The audio files were directly transcribed verbatim, and the researcher familiarised herself with the data by reading and re-reading the transcripts as well as going through the observational notes made during the interviews.

Phase two: Initial codes were generated by assessing the data and identifying features of the data that were interesting, meaningful and/or repeated within each transcript or across the data set.

Phase three: This phase included examining the codes generated and grouping them into broader themes. Themes in this study were data driven therefore no specific questions were in mind when coding or selecting themes.

Phase four: The potential themes were reviewed constantly using dual criteria; all patterns and extracts within the themes were assessed to ensure that they made sense and those outside the theme were clear and identifiable (Braun & Clarke, 2006).

Phase five: After successfully reviewing the themes and selecting subthemes in the phase above, the themes were named and defined by creating a summarised description of each theme to ensure clarity and the essence is captured.

Phase six: this phase involves producing a report. Presentation of the analysis and data extracts to support the interpretations is included in the results chapter to follow.

3.8 Research Trustworthiness

Trustworthiness or rigor of a study refers to the degree of confidence in data, interpretation, and methods used to ensure the quality of the study (Polit & Beck, 2014). This term is used to signify how much faith, or trust, can be placed in the findings of a qualitative study (Ellis, 2018). The key markers of trustworthiness will be discussed below according to the aspects of credibility, dependability, transferability and confirmability.

3.8.1 Credibility

Credibility in the interpretivist paradigm refers to the extent to which data and its analysis is considered trustworthy, believable or authentic (Kivunja & Kuyini, 2017). To ensure credibility, this study followed standard procedures typically followed in qualitative studies which included continuous observation to ensure the questions asked were appropriate to the study, peer- debriefing and self-reflection (Connelly, 2016). In addition to this, the purpose of this study and its method and the data collection and analysis process detailed. This study method was adopted for its suitability in achieving the study aims.

Phenomenology is a widely accepted as a method in qualitative research (Creswell, 2009) and was suitable for this study as it allows for investigation of individuals lived and subjective experiences.

3.8.2 Dependability

This criteria is similar to the concept of reliability in quantitative research (Connelly, 2016). Research dependability refers to the stability of the data over time, that is, the ability to observe the same outcome or finding under similar circumstances (Kivunja & Kuyini, 2017; Polit & Beck, 2014). Steps taken to ensure dependability included detailing the research procedures, that is, how the sample was chosen, and the data collection and analysis process.

3.8.3 Transferability

The criterion of transferability in qualitative research is the equivalent of external validity in quantitative research (Kivunja & Kuyini, 2017). Transferability refers to the extent to which research findings are useful to people in other settings (Polit & Beck, 2014). To support trustworthiness and transferability, the researcher provided detailed description of the research context (study location, participant demographics) and the criteria used to select participants. Although the aspect of transferability is unique because it is the readers, who determine if a study findings are applicable and relatable to their own contexts (Connelly, 2016; Polit & Beck, 2014), the researcher worked to enable the reader to make such a transfer if needed by providing contextual descriptions of the phenomena being studied.

3.8.4 Confirmability

Confirmability in qualitative research is used in preference to objectivity in quantitative work. This term refers to the degree that the degree that a study's findings are consistent, and can be repeated or confirmed by others in the field (Connelly, 2016; Kivunja & Kuyini, 2017; Polit & Beck, 2014). Given the nature of qualitative research and the role of the researcher as a key instrument, there is a difficulty in obtaining complete objectivity, in its real sense as researcher bias cannot be entirely eliminated. In the current study, consistent efforts were made to ensure that as far as possible, that the research findings were the results of the authentic experiences and perspectives of the participants.

This required a state of reflexivity, as the researcher reflected on her position within the research while simultaneously collecting data. Further information of the researcher's reflexivity is detailed below

3.9 Reflexivity

Reflexivity in research is the process of internal dialogue and awareness of the influence the researcher has on the topic and people being studied as well as recognizing how the experience is experiencing the researcher (Berger, 2013; Pillow, 2003; Probst, 2015). Reflexive engagement is a continuous process that ideally occurs during the planning, conducting and writing phases of the research (Probst, 2015). A researcher's position can impact the research in three major way: (i) access to the field (ii) the nature of the researcher-researched relationship and (iii) the background of the researcher affects how they interact and make meaning with information (Berger, 2013). Probst (2015) studied the benefits and challenges of reflexivity in qualitative research by collecting data from researchers who have reflexive in their own qualitative work. Her findings showed benefits of reflexivity include: accountability, integrity of the research process, the quality of the knowledge generated, the ethical treatment of those being studied, richness and clarity of data, and the researcher's own well-being and personal growth (Probst, 2015).

The researcher of this study is a young woman in her mid-twenties, a foreign national and daughter of an expatriate which is how she migrated to Durban- to join her family. The researcher was aware of her position, in the population she was studying, and was intentional to ensure this position would not unfairly impact the research. The interview questions were developed based on a review of literature and not personal experience. The researcher's foreign status was used as a strength to build a good rapport with the participants. This aided in making the participants comfortable enough to give authentic descriptions of their experiences. Awareness of subjectivity develops through internal processes and supported by external activities (Probst, 2015). Reflexivity in this study also included consultations with the research supervisor for support, and to provide an objective voice as the data collection, analysis and reporting occurred. Supervision provided a space for the researcher to actively monitor her biases, experiences, assumptions and maintain a balance between personal experiences and the universal.

It is important to note that while reflexivity has benefits and is important in qualitative research, it is not a solution to subjectivity. Reflexivity should not be used to imply that the issues of inequality, bias and misunderstanding have been addressed because the researcher is aware of them (Probst, 2015).

3.10 Ethical considerations

This research project was granted full approval from the Humanities and Social Science Research Ethics Committee of the University of KwaZulu-Natal (Reference: HSS/ 2171/017M).

In the current study, care was taken to assure that the appropriate sample was selected by confirming the foreign status of a recommended participant before setting up any further communication. Participants were contacted as described above and requested to volunteer for the study and informed of their right to withdraw at any given point. Majid et al. (2017) emphasize that informed consent should not be ascertained only at the beginning of the research process but that it is an ongoing process and researchers should create an open communication process where the participants are willingly part of the study (Kidane et al., 2020). The participants were required to sign a consent form which outlined their ethical rights. Additionally, before the interview began participants were verbally requested to confirm their willingness to participate and informed that they could withdraw, without any penalty at any point. Confidentiality of the participants, which is an extension of their right to privacy, was assured as participants were issued codes which were used in analysis or reporting of the data. This also helps to maintain anonymity (Creswell, 2009). To protect the privacy of the individuals, the audio recording began after demographic information was collected and each participant assigned a unique participant ID which was used to name the audio recording and transcripts for storage.

To maximize good outcomes, the participants were debriefed after the interview process. Participating in research can have both an educational and therapeutic value. Therefore, the process of debriefing provided an appropriate time to consolidate the information gathered and answer any additional questions the participants had (Lincoln & Guba, 1986).

3.11 Conclusion

This chapter covered the interpretivist paradigm that this current study falls in and the research design chosen- qualitative research design was best suited to achieve the study aim. Detailed descriptions of the data collection process and selection was provided in this chapter as well as the instruments and process of assuring research trustworthiness. The chapter ends with the researcher's reflexive position and the ethical considerations undertaken while conducting this study. The next chapter presents the study findings.

CHAPTER FOUR

PRESENTATION OF FINDINGS

4.0 Introduction

Chapter four focuses on presenting the findings that emerged through analysis of interviews with expatriates living and working in Durban, South Africa. The findings are organized in key themes, generated through thematic analysis. In unpacking and substantiating each theme, efforts were made to root the findings in the data and to ensure accurate representation of the participants' experiences. This can be seen in the reference to participant's direct quotations under the key themes. As not all participants are first language English speakers, some quotations presented in this chapter have been edited to make the presentation coherent and easy to read. This was done with extreme caution, making sure the essence of the participants' voices was not altered. Seven themes and one subtheme were generated, as shown in table 4.

4.0.1 Themes generated

Data collected from the ten interviews yielded seven themes which are shown in the figure below and discussed thereafter.

Table 4: Key Themes and Sub-themes

Theme 1:	Difficult visa application processes
Theme 2:	Cultural differences in the work and social settings <i>Subtheme- 2.1 Seeking personal diverse experiences</i>
Theme 3:	Family Adjustment
Theme 4:	Distance away from home country
Theme 5:	Uncertainty of expatriate assignment
Theme 6:	Previous Expatriate Experience
Theme 7:	Support Systems

4.1 Theme One: Difficult visa application processes

All the ten participants had to apply for temporary resident permits allowing them to live and work in South Africa. Nine participants reported that they experienced problems in the application and renewals of the permits. Difficulties included the department of home affairs losing documents, incorrect information on permits, delays or denied applications:

Umm, the first submission was lost so I had to re-submit and the biggest challenge to be honest was getting the legacy documents like grades, the actual certificate, the police clearance you know, its, well there is a name for people like me coming her and being allowed to work, something to do with a skill set (Participant three).

For one participant, his visa application was a particularly stressful and long ordeal as he had to travel outside of his home county to find a South African embassy:

Well basically it is a very challenging issue. When you look at Sierra Leone, it is in West Africa and it did not have a South African embassy at the time of my application so you had to leave Sierra Leone and go into the neighbouring country... So now, imagine if you are coming to work in SA and you are applying for a visa. It's going to cost you up to 700 dollars. That is 700 to Ghana for transport alone. Then you have to pay for accommodation also and the entire process takes about 10 working days. And who knows, maybe there might query one of your documents so it may take longer. It is a bit challenging (Participant seven).

The department of home affairs also issued visas with incorrect information which had negative consequences such as, delays in starting employment, families being separated as they await permit for all family members. There was a general consensus that the incompetency experienced were to be expected and expatriates just had to plan around them:

Getting my Visa took nine months and then it was wrong. Luckily the company let me start working when I was not supposed to and then I resubmitted it to get fixed and that took another year by which point I had to actually leave the company and got a new job. I applied for that visa that took me four months

and it came back also wrong, so they didn't let me start. All so wrong... the fact that home affairs are so inefficient, it takes so long, and they do it wrong (Participant four).

Participant eight noted that receiving accurate information about the timeline of the applications, instead of unexplained delays was preferred:

It can be frustrating but there are processes and we found that as long as you follow the process then things happen... Then with the everything you are told, they say how many months it is going to take, and they say it going to take at least 8 months, maybe they would say 8 to 14 months and then you know that that is how long it going to take (Participant eight)

Despite some companies assisting their workers with the process of acquiring work permits once the application was handed in, there were still delays which sometimes included the expatriates being separated from their families

When we came here, I got 2-year visa then it was extended for another 2 years and a year ago it was expiring, umm, so I applied again for extension I was refused. Then I had to spend a month in London away from my family who were here applying from the UK, and I is granted another 4 years... the company is dealing with getting the papers ready but there were still delays (Participant ten).

Since all foreign national individuals need some form of a temporary residence permit to gain entry into Durban and South Africa at large, these difficulties often mean that expatriates either cannot accept work assignments in Durban, or have to leave the city prematurely:

I know masses of people that kept having problems some of whom are appealing time after time. Many experts have left, and the expert community shrank a lot because of this immigration issue. People who had businesses, closed businesses and left. I don't know what can be done because South Africa claims that they have so much foreign investment but on the other hand they block everything. So they have to decide which way they want to go and what they want (Participant ten).

4.2 Theme two: Cultural differences in the work and social settings

Cultural differences discussed by the interviewed participants included language, interactions in social spaces and in the workplace. Of the participants interviewed, only black individuals reported having language barriers in both their workplace and social interactions:

Yeah, I have encountered some difficulties, especially not being local, my employees will sporadically speak to me in Zulu before remembering that hey I do not understand. This happens to be a Durban thing, when I was in Pretoria, I didn't have an issue, and even in supermarkets here everyone just speaks Zulu to me (Participant seven).

As the quote above suggests, the participant has worked both in Pretoria and Durban and found that people in Durban assumed he understood a local language more than they would in Pretoria.

Only one participant spoke fluent isiZulu and for another, her solution to facing this language barrier was to learn at least the basics of the dominant language in whichever country she resides or works:

It is a bit rude to go to someone's house and insist on. My aunt would say "you are going into someone's house" you cannot go to Mozambique and demand to speak in English. It would do you wonders to learn these and in terms of like basic working knowledge local dialect like basic you know and negotiation language is what I tend to pick up. It is courtesy here South Africa and I think that is why South Africa has an appeal for expatriates because by large everyone speaks English even if they are Afrikaans, they speak English (Participant five).

Cultural differences were also noted in the workplace and affected how the expatriates carried out their duties:

For sure my management style has changed because I had 2 experiences working in Australia and Philippines quite opposite. South Africa is a mix... Depending on where you come from you could see some culture shock but generally 'Durbanites' are warm friendly people but they love being respected

so you almost cannot talk down to a 'Durbanite' and get away with it. You should be polite and you should be sensitive to their feelings as well. They like to have their cup of coffee, coffee moments. I see that they love to share meal times having a braai it is used to connect. Be prepared for, for someone like me coming from Nigeria to say that 'Durbanites' can be labile, they like lazy life (Participant one).

For another participant, he found that accommodating culture seemed to be one directional in that the expatriate was expected to adapt to the office culture and not vice versa:

It is difficult sometimes, I feel like it is expected for me to understand and always be culturally sensitive to employees in the workplace however, there are not sensitive to me in any way" (Participant nine).

Two other participants reported cultural differences they observed in societal behaviours:

Um, I do not know if you know much about British people? So we are quite reserved and we do not like to queue and like our own person space and people here tend to want to share everything! (Participant four).

4.2.1 Seeking personal diverse experiences

Some participants indicated that they made the decision to work outside of their country as a move to expose themselves and their families to different and diverse experiences. This was especially an important factor that was considered in the decision to relocate with families, as reported by participants one and six:

As a mixed-race couple, so my husband was born in Singapore, he is Indian by race um, so our kids are biracial and we lived in Michigan, it was very black and white, you were either black or white and our kids did not really, we found that they did not really fit in the white community and the black community either, so they did not fit either and we were trying to find a way to see that the world is not this little town... We did not even now this when we got into the expat community, it is so diverse, like there are so many couples like us, that one couple is different races, one country or religion and the other couple is

somewhere else and you just blend and their kids blend and my kids just thrived, like they loved it because all of the sudden there were kids like them (Participant six).

For some participants, like participant one, saw value in exposing them and their families to new cultural experiences by relocating together for the work assignments:

For my kids growing up giving them experience to growing in new environment, meet new people, new friends in school is something I thought would help them in their developmental stage as young kids (Participant one).

Another participant, who initially came to Durban for individual charity work and later returned as part of a charity organisation, says that for her, sometimes it is more than work than drives people to move to a new city:

Charity work, so I have been a teacher in the UK for 11 years before we came here. We came for a month as a family and felt that South Africa is the right place to be at that point in time. We observed what was happening here and reported that back to the UK and a year after we moved with that kind of role to empower in the local teachers (Participant eight).

4.3 Theme 3: Family adjustment

Most (eight of the ten) participants had relocated to Durban with their families. Despite family being a source of support, there were concerns that their spouses and children may have difficulties to adjusting to the new systemic structures, for example, differing school systems. The biggest challenge to adjustment was transitioning to a one income home as spouses would not work. All spouses accompanying expatriates are granted a spousal visa which does not permit the individuals to seek employment.

She gets an accompanying spouse visa, she doesn't have the right to work. Then the kids they get the school visa which allows them to study..., I had it easier, but for my wife it was a big learning curve, second it was not easy because she was not under a work visa. She had to make new friends, she had to find some hobbies to keep herself busy then she has got the stress of the kids to cope with so I think the first couple of months was getting her out of that space to say from all this confusion and all this stress (Participant one).

The spousal permit does not have the same conditions globally. In some countries, these individuals can work and this change of status in South Africa was something that spouses of the expatriates struggled with when being transferred from a previous assignment to Durban:

Not being able to work here, my wife never imagined that you know that she would have to live the life that she can't work. That was a really big problem-not initially when she came here because she was pregnant and my daughter was born and she was very small and sickly child but then in some point it is annoying, that you can't work. She wasn't happy, I couldn't say I am not taking this job because my wife can't work here so it's, yeah (Participant ten).

Some participants mentioned how their spouses struggled with transitioning from having a full-time jobs or businesses in their home country to having no income generating activity in Durban:

You know for me, having worked in the same company for the last 12 years and having come to South Africa multiple times as well... she was working and then she got into her own business which was very demanding and took like almost 14 hours of her time. All of that shorting to zero was quite a big shock for her (Participant one).

Another participant touched on this same issue mentioning that often for the working expatriate, their spouse is often left to deal with the different facets of the transition, for example, finding access to daily amenities and children's schooling:

When you arrive to a new place with the family. You know as the husband leaves in the morning to the office it is the same environment the same company, similar way of doing things so I know I am sorted. And you know the kids have a place at school, they go to school it takes them a while to adjust but, and then she is left to make her life with nothing, if we are lucky we are somewhere where she can go to work then it is easy because it all falls in place (Participant ten).

Finding appropriate schools was also a big stressor for the participants as the dominant schooling system in South Africa is unique to this country thus children have to adjust

to a different schooling system. Expatriates often had to resort to sourcing alternate schooling systems, often in different cities for their children:

We struggled with the school system here. There is not an international school in Durban, so when you are in Jo'burg or Pretoria you have an international school; an American school and a British school to choose from (Participant six).

Children of expatriates found the schooling system difficult to navigate as the South African school values were different to other schooling systems they had attended:

And although she was with some of her friends, from there everyone moved on and you know here I think that education of children and bringing up of children is very particular... My daughter didn't understand the school culture here because the American schools have a completely different upbringing-you don't compete, you just do your best. She didn't understand why it was so important to have badges for example because she wasn't in this competitive mind-set. So after a year and a half of her struggling to fit in, we decided that she would go to the UK which worked out great anyway because anyway we wanted her to do the IB curriculum (Participant ten).

All participants indicated that their families were the first consideration when deciding whether or not to accept an expatriate assignment. Participants agreed that how family members deal with the adjustment to a new country and city was a major stressor which could affect their work performance. The general consensus was that it is easier to adjust when relocating without children as expatriates could solely focus on their work and their own adjustment rather than supporting their family too:

I didn't want to destabilise my children; they are settled back in Sierra Leone with their mother. Besides, I would worry about them a lot when here, it is better this way as I am able to work without worrying about how they are doing in school and stuff (Participant seven).

Only one of the ten participants reported having been on expatriate assignments both with his family and without them. He noted there was a difference in the transition time when relocating alone, as opposed to relocating with family:

Expat life for family and expert life as a single adult are two different worlds apart. With the family the transition time to stabilise can be longer and more stressful but once you hit that sweet spot it becomes a lovable experience for everyone (Participant one)

4.4 Theme four: Distance away from home country

Physical distance between the expatriates and their families was considered a challenge as they were not only away from familiar support systems, but they also faced with costs and worries especially for families separated from their children.

I worry for them [my children] more back in the US right now because it is overseas, because the younger two are brown and that is an issue in the US right now and it is something growing up I never thought would be an issue for my own children... he is a typical teenage American boy [giggles] who is growing up in relatively privileged life and he is sassy and he does not think that...and because we have lived overseas since he was eleven, he has never been confronted with that and that is like 'oh boy, I need to like sit him down (Participant six).

For this participant being separate from her children created an additional worry that was not present before the move to Durban. Being away from aging parents was also discussed as a challenge as one was not readily available to physically take care of their needs:

My husband's mom is rather old. His father died 2 years ago. That's another quite difficulty when we are this far and having aging parents. It is very difficult to manage when you are not there to see how they are doing (Participant ten).

Being far away from home also meant that expatriates missed important life events, such as deaths:

My mom passed away in October the year before and... Umm that was a relatively stressful time although I kind of knew it was coming-, she had cancer. There was a lot travelling back and forth, plus running a business and maintaining a family as the sole breadwinner. I was completely overwhelmed and stressed out during that time (Participant three).

Most participants reported visiting their home country or hosting their family members in Durban at least once a year as a way to maintain these familial connections. For another participant however, they were advised to do the contrary in their first two years of relocation:

I think because we came when my son was still quite young, we made a commitment to go back so that you keep contact with those relationships as much as possible. So, it is probably every few years. I think when we first came here we were advised not to go back within two years. It was like a grieving process, they went through the process and explained how relationships, you need to let the go and if you keep going back to your country and you start those relationships again. You never actually settle when you keep going to your home country and so we made sure we did not go back and after that it did help. Just saying "this is home" as much it can be home, so we try and get back every two years (Participant eight).

4.5 Theme five: Uncertainty of expatriate assignment

Life as an expatriate is seen to be full of uncertainties as the individual is often not in charge of the country they relocate to or their length of stay. Work assignments were reported to last: one year being the minimum and two-three years being the maximum. Participants often felt that although the length had no impact on their working, it affected their personal and social lives:

You know at this point we are waiting to hear what next because we have been here long enough that we are due to move. And it has been dragging on quite long so I am worried about because my daughter is 14 so wherever we go will be probably where she finishes her schooling and that is, I would say the company career planning. They have done is, it is a big company, they have done it thousands of times and still it is you learn 2 months before you move. I am not happy from that" (Participant ten).

This participant describes the stress caused in the short time frame one has to leave and transition to a new city. The relocation often involves migrating with family members which can itself be stressful.

For many participants, sometimes the choice to leave or stay also depends on matters outside them or the companies they work for, for example, permits. As mentioned before, difficulties and delays in the home affairs department have caused premature exits out of Durban. Participant eight describes a time when she was applying for a renewal of her permit and she did not know if it would be accepted:

...and I think that has probably been the biggest stress; not knowing that in 6 months you are going to pack and leave yeah. I think especially when you want to stay and you don't know... it just that uneasiness in between (Participant eight)

Not knowing for sure how long one's contract would be seemed to affect the ability to make long term plans, and also development of social bonds:

"When you do not know whether you can stay or not, it comes to what you invest in what you are doing and obviously how people view you. Because when they do not know whether you are going to stay, how does that affect how your relationships develop, if they think well she will leave anyway? I think more socially. I think with work people believed, if it is the right thing, then it would work. Um, whereas socially maybe not so easy" (Participant eight).

The participants mentioned that it was difficult to maintain friendships, which resulted in a skewed work-life balance

I don't have the luxury of a circle of friends; I have got no friends in South Africa. I have got colleagues but I can't really call them friends. I just have my wife and my work so I focus on that so I can be successful (Participant three).

Uncertainty also presented in terms of limited options for expatriates when planning their relocation, for example with service providers. As mentioned previously, most companies provided a budget or selected housing and made allowances for relocating furniture etc. This however meant that the expatriate was left with no choice but to deal with the selected service provider despite any shortcomings:

It has its pluses and minuses because you have all the help but you have to for example here they use Elliot to pack and we have had terrible stories of the moving company, that they break steal and this, friends had terrible problems*

and we can't say we don't want them to pack we won't for example pick who we want to deal with this (Participant ten).

For participant three, he was unhappy with the accommodation arranged and seeking alternate housing meant he had to incur his own costs:

This was part of the dialogue before coming over and I am quite fussy so I didn't want to come and be unhappy in a place I haven't chosen but that did happen... the apartments are and it was hideous, So I then ended up living out of a suitcase at my own cost for a couple of months going from place to place trying to find the right place.

All the participants except three stated that the companies they work for had structures in place to assist with suitable housing, transport and visa applications. This facilitated the process of settling in Durban as most participants found these services satisfactory.

They handle everything we do not have to apply for that [visas] or do anything. They did our housing, they supplied our house and it comes furnished, so we are really privileged in that respect, you have don't any choices and they just put you where they have a house, but you know, they are nice houses, there is nothing to complain about with any of our houses (Participant six).

Two participants that were working for the same company explained that their company relocation policy included a "pre-assignment visit" which is a visit to your intended workplace before commencing to view the city and make living arrangements.

What helped was that they gave us a company assignment visit. Therefore, when I came in for the pre- assignment visit where we had to look at potential property, accommodation, school and in the process went to car dealerships I made sure that everything was right. We got a picture, my wife especially. In fact, the house we are currently occupying was found by my wife during that pre-assignment visit (Participant one).

The relocation services, they helped with the packing, finding a house and collecting all documents for the visa they do all that. I think they do like a tour around and show you things around (Participant ten).

Dealing with environmental factors, for example the crime rate contributed to uncertainty and stress for participants. All participants mentioned being warned about the crime rate in Durban and considered this in the choices they made, for example, where to live:

When we first arrived, we stayed in a free-standing house umm because my husband thought if you live in a country you live like most of the people and at this point it wasn't so dangerous here. I think you heard horrible stories in Johannesburg, some in Cape Town, but Durban was fairly safe 15 years ago... Gradually we started to hear stories and worse and worse things were happening closer to home- the Northern suburbs. That's when we moved into a gated estate (Participant ten).

Some participants noted that crime was an objective concern however they tried to not let be a major stressor:

I try not to elevate it to a stress level, but the crime here and the pettiness of the crime is annoying. yeah, my car hub caps on my car got stolen, notice how I don't have any hub caps on my car right now? All four got peeled off in like 10 minutes right next to my flat. Which means someone right in one of the buildings next door has been eyeing me for a while, saw me out for a second and took them and ran off. I was like because I am an expatriate, let it go. We have had at least 28 guys killed at least since January in this area... I cannot explain this, I cannot figure this out and it is definitely as stressor because you are perpetually like what dumb stuff is going to happen today so that is a stressor (Participant five).

Another participant mentioned that despite being warned about the crime statistics, he chose not to be fearful. He chose the location of his home, his social settings and friends based on preferences and not fear of crime as he had been advised to:

Umm, some of the things you hear and read of, I was very adamant in my own mind to not be feared or have a fear of the crime and what goes on because I think that if you fear a dog, it will bite you. So even now I walk through the middle of town in a suit... I will get stirred up but not, touch wood, but in 6

years nothing has happened. Umm and I think the more you are scared of it, the more it can, but again we can never know (Participant three).

4.6 Theme six: Previous expatriate experience

Participants with previous experience living and working away from their home country before, transitioned easier to Durban than individuals who were on their first assignment in Durban. Half of the participants interviewed has been on previous expatriate assignments while for the remaining five, this was their first international work placement. Durban is a metropolitan city, similar to other developed cities in the world which made it easier for most expatriates to transition to their new environment:

It is not that different to the town and the villages I get up in, similar to Umhlanga and La Lucia and there is a place where I grew up Scots and heath just like Umhlanga, it has got strips of bars and restaurants and salons and so on and so on. So the actual environment apart from the climate isn't that different. Umm, the people are different all over the world when you go to New York different environment, and also in Joburg different culture so it is not actually that different (Participant three).

Previous experience gave participants a reference which they could use to compare or contrast with their relocation to Durban

It is so easy here, very easy and so far I have been really lucky. Sri Lanka was the hardest post I had, because there, people speak Sinhalese, it is a crazy language, it is very difficult, like all the swirls. I was hard to try all of the signage it is in Sinhalese and you could not drive there anyways (Participant six).

One of the ten participants had previously lived in South Africa as a foreign exchange undergraduate student. This former experience gave her an idea of the infrastructure once she was sent to Durban on a work assignment:

I have the advantage of having studied here and that was big one, I had a local infrastructure place in terms of friends and I have my adopted aunty... it was very logical to at least base myself here instead of basing myself in places like

Cape Town or Jo'burg where I don't actually have a working knowledge of the city (Participant five).

Another participant had experience working in his company's Durban office from previous conferences so adapted well to the workplace once he relocated here as he knew what was expected:

My previous role in say 2012 I used to visit South Africa for business visits because in my previous role I used to have responsibility for East Africa, West Africa and Southern Africa procurement. So we would come for procurement conferences you know for me, having worked in the company for the last 12 years and having come to South Africa multiple times as well, I had it easier (Participant one).

4.7 Theme seven: Support Systems

The participants cited support as an important component in their adjustment. Support was classified as both formal: structures or individuals assigned by companies to assist with relocation and informal: friends and family members.

Some companies have employed allocated individuals whose task is to assist with relocation of expatriates. From the interviews gathered, their main task seemed to revolve around making sure they oversee suitable accommodation, transport and access to daily amenities. These individuals were cited as an important source of support especially in the first few days of moving. Participant one reported that as part of his company's policy, he was assigned a relocation expert:

The company arranged a relocation expert. I think she scored top marks she really made settling down for myself my wife my kids very memorable. My kids they still have that memory even after almost 2 years. She is a very wonderful relocation expert.

Another participant underwent formal therapy prior to her relocation to Durban and the company continued this form of support by having frequent skype interviews in their first two years:

We both had to go through psychological testing, both of us had to have quite in-depth interviews and psychological interviews to actually check that coming into another country, we would be able to cope, so thinking more about the

emotional part of it...: I found it helpful to be able to talk and to help me process what was happening and I think once we had been here 18 months, then we had to have another round of those just to see how we were doing (Participant eight).

Although four of the participants did have access to formal support, only the two above found it helpful. Participant ten found that the relocation expert was not helpful:

It was incredibly bad and we nearly sucked the relocation agent because you know we have done research before we went for pre-visit and we said those are the houses we would like to see and he just wasn't able and he was on the phone looking for other jobs for himself, so it was a disaster. We have a sponsor, they have a system where they give you a sponsor and that person is supposed to help you and I never met my sponsor until I think a month before they left country. They were a lousy sponsor (Participant six).

All participants cited their friends and family members as being critical support systems during their stay in Durban. Participant four found that she heavily relied on people she met here to assist her:

Once I made friends, I was like "where do I go to buy toiletries, where can I get my hair cut or my nails done?" and they would like...show me where to go".

As participant six mentioned, most expatriates tend to rely on their friends as they are away from home:

In a new city at the end of the day most of my support system became my friends and their spouses (Participant six).

These companionships however had to be actively sort, as two participants explain:

If people say "we should go for coffee" actually take them up on it and don't be like "oh that is so nice" and then sit at home and do nothing. Sometimes you have ten girls you are going to dinner with and you don't know them, but just go, it is so funny. We do have to make our efforts, it is not going to come to you because everyone has their own lives already and you have to sort of wiggle your way in (Participant four).

I am global like most of my colleagues are, one of the things about this type of work is that I would not say that you get very lonely and I am an introvert as well. But my friend in Singapore says “you must force yourself to get a network of women in Durban” and that is what made me reach out to the friends I have now (Participant five).

4.8 Conclusion

Chapter four presented the findings of data collected from conducting interviews with expatriates about their experiences adjusting to life in Durban and any stressors or challenges they faced. Seven themes were generated 1) difficult visa applications; 2) cultural differences in work and social settings, 2.1) subtheme seeking personal diverse experiences; 3) family adjustment; 4) distance away from home country; 5) uncertainty about expatriate assignment; 6) previous expatriate experience and; 7) support systems. The themes were grounded in data, showcased by the supporting quotes provided for each theme. The following chapter will discuss the findings grounding them in the theoretical framework selected for this study.

CHAPTER FIVE

DISCUSSION

5.0 Introduction

In this discussion chapter, the themes are broadly categorised into two categories-those that facilitate adjustment and stressors or challenges reported. The chapter discusses how the study findings reported are similar/contradict existing literature, as well as use Lazarus' stress theory to potentially explain the differences noted.

Table 5: Challenges faced and Factors facilitating Adjustment

Stressors/Challenges
<ul style="list-style-type: none">• Theme one- Difficult visa application processes• Theme two- cultural differences in work and social settings• Theme three- family adjustment• Theme four- distance away from home country• Theme five- uncertainty of expatriate assignment
Factors facilitating adjustment
<ul style="list-style-type: none">• Theme six- previous expatriate experience• Theme seven- support systems

5.1 Difficult visa application processes

All participants were required to apply for visas before entering South Africa, a process which was stressful and cumbersome for most. The South African work visa allows for immigrants to enter and legally work in South Africa for a period of 5 years (Intergrate-Immigration, 2015). Receiving an expatriate assignment abroad and entry into that new country are separate and often uncoordinated processes. Despite understanding the need for the South African government to exercise state's power by controlling movement of people in and out of national territory (Peberdy, 2001), the denied applications, delays, misinformation and lose of applications presents expatriates with challenges as they prepare to migrate to South Africa. The visa

application process is the first encounter expatriates had with Durban, South Africa. Given how difficult the process was for most participants, it is possible that participants could have appraised the whole expatriate journey as negative and a stressor, thereby inhibiting their adjustment process.

Visa applications go through two processes: (i) evaluation- the department of home affairs will carefully assess the foreign employee for eligibility to ensure a South African candidate could not be found and (ii) application- when the department now reviews the documents handed in by the applicant before giving a final outcome (Intergrate- Immigration, 2015). This process can take 6 to 12 months, after which the final visa may come out with incorrect information as described by the participants. This was often frustrating for the expatriates' family and the employer who may not be able to afford the long waiting periods. Luckily, no participant in this study had to pre-maturely terminate their work assignment and return to the country of origin because of visa issues however the delays resulted in strained relationships, especially for participants with families who had to remain separated until all family members' visas were issued.

Employers of participants in these study facilitated the work visa applications for the expatriate only, and not for their trailing spouses, which is the norm in most companies (Vögel et al., 2008; Tahir and Chamas, 2019). Children and spouses were issued "accompanying visas" tied to the expatriate's work visa which allowed them multiple exists and entries into South Africa but not the ability to legally work. This meant that expatriates had to choose between being separated from their family or becoming a one income household. It is not surprising most chose the latter as will be discussed later, in the social support and family adjustment themes, having strong family connection and support is a great mitigating factor in the adjustment process.

Although it can be understood that the strict immigration laws are the nation's way of protecting itself and its citizens, there is a general consensus that the immigrations selection process is tied to class, wealth and the skills of potential immigrants (Peberdy, 2001). This fact did not seem to play in this study's participants as there were individuals who originated from developed countries (e.g. Australia and United Kingdom) and they faced numerous challenges in the application process (Black & Hornsby, 2016). The South African immigration selection process conveys a self-

image of the country as a ‘magnet’ and the land of ‘milk and honey’ race, and stereotypes of nationals which then leads to xenophobia as has been recently observed in the country (Lee & Schoole, 2015; Perberdy, 2001).

5.2 Cultural Experiences in work and social settings

Adapting to the host country’s culture is fundamental to expatriate adjustment and success in their workspace and social interactions (Brown, 2008; Edmond, 2002; van der Bank & Rothmann, 2006). Participants in this study reported both positive and negative cultural experiences while they were living and working in Durban. One subtheme that was noted under cultural experiences was the expatriates’ being motivated to move to expand their exposure to diverse cultures.

Research into expatriates as defined in this study (individuals who are dispatched/assigned to international posts by their company) has not explicitly documented cultural expansion as a motivator or factor in adjustment. Richardson and Mallon (2005) studied self-initiated expatriates, i.e. individuals who themselves decided to expatriate and work abroad (Selmer & Luring, 2011) and identified adventure/travel as the most common reason why self-initiated expatriates chose to work abroad. These individuals had a desire to see more of the world, seek adventure and were in search of new diverse experiences (Richardson & Mallon, 2005; Selmer & Luring, 2011).

The cultural differences recorded from the participants include language, and behaviour in social settings and the workplace. History of colonial powers and language play a major role in how people choose to migrate- most people would prefer to move to a country in which the main language medium is similar to theirs (Ngwenya, 2010). Selmer and Luring (2015) cite language proficiency, familiarity with cultural norms as integral to adjustment. Strong language skills assists the expatriate to ascertain any necessary information regarding the different cultural dimensions in their host country (Tahir & Chamas, 2019) which can be helpful in adjusting. Nine of the ten participants in this study originated from countries where English was the main language, similar to South Africa. The notable language challenges experienced were by African participants whom were expected to know/speak isiZulu which is the majority African language spoken in Kwa-Zulu Natal. This was perceived as a stressor as the participants had to consistently ‘bothered’ and

frustrated as they had to explain why they did not speak the common language. This is consistent with previous literature which cites language problems as a source of major frustrations and dissatisfaction between expatriates and the host countries (Neal, 1998; (Ngwenya, 2010; Thela et al., 2017).

Cross-cultural training is an effective way to mitigate the frustrations that can occur from cultural differences (Brown, 2008; Edmond, 2002; Zhu et al., 2016). Training serves the purpose of improving location specific skills of the expatriate as well as improve coping skills of them and their families (Edmond, 2002). The workplace cultural experiences of participants in this study are similar to those of Zhu and associates' (2016) research that noted cultural norms dictate every day human interactions such as: whether, when, and how to apologize for mistakes; coping effectively with conflict; norms for collaboration; what constitutes early, on time, or late; how to give both feedback and respect to supervisors and subordinates; what is funny or cringe-worthy; and what constitutes reasonable disclosure of personal information or space to work colleagues.

Having prior learning of the host country's culture equips the expatriate with resources on how to effectively handle their new routines, social interactions and any possible conflict that may arise from associating with others of dissimilar backgrounds (Zhu et al., 2016). Cross-cultural training does not eliminate cultural differences as a stressor for the expatriate, but rather armed with information, they can positively appraise their new environment and adopt effective coping mechanisms, relative to expatriates who have no such experience.

5.3 Family Adjustment

Family adjustment, or lack thereof has been recorded in literature as the most important factor to consider in expatriates ability to effectively adjust to the host country (Brown, 2008; Fukuda & Chu, 1994; Sarkiunaite & Rocke, 2015; Trompetter et al., 2016). Family issues or concerns ranks as the top reason why expatriates declined international assignments or prematurely returned to their home country (Brown, 2008; Edmond, 2002; Konopaske & Werner, 2005; Trompetter et al., 2016). Most of the participants in this study had relocated with their families and cited this as a major stressor in their life. A major concern was the transition to a one income household as accompanying spouses could not legally work while in South Africa. Similarly, Brown

(2008) and Chen & Shaffer (2018) found that spouse adjustment was a major determining factor for the expatriate's adjustment. Spousal dissatisfaction was the top reason for failure or particularly in dual-career households (Chen & Shaffer, 2018). Often, for the expatriate to accept their assignment in South Africa meant that their spouse had to give up their career for the duration of the assignment. The expatriates' family members are left to deal with the intricacies of daily adjustment separately or alone, as their family member has to report to work.

Brown (2008) and Trompetter et al. (2016) reported similar findings to this study, that the local pressures associate with relocation such as health, security were then left to the unemployed spouse to handle, often without any structured support. An added pressure for this study's participants was finding appropriate schooling for their children (Mtapuri & Umubyeyi, 2019), given the South African schooling system is specific to the country and not adopted anywhere else. Sarkiunaite & Rocke, (2015); Tahir and Chamas (2019) concur by noting that the expatriate's family or partners are often overlooked, as companies focus on maximizing adjustment for the expatriate alone. Family adjustment was appraised as a stressor by all expatriates (McClain et al., 2019) and placed an additional burden to the individual who may already be struggling to adapt to their new working environment. The expatriate may on their own cope with the stress that comes with moving but the inability of their family to do causes further stress for the spousal relationship which ultimately affects the whole family. This was echoed by a participant who had been on two different assignments- one without his family and his current one with his family. The participant reported these experiences as "two different worlds" and found that the coping mechanisms he had developed while alone, were not sufficient to assist in the family's adjustment.

Companies and HR managers need to understand how important families are to managing their employees stress and adjustment to avoid the risk of lower job performance, psychological distress and ultimately the expatriate failure (Kidane et al., 2020). Spouses and children should not be viewed as impediments to be managed but partners who stand to gain from the expatriate process as much as the expatriate employees themselves (Tahir & Chamas, 2019). Suggestions on how to aid family adjustment include having preparation programs that include the line manager, expatriate and the accompanying family (Trompetter et al., 2016); and continued

organizational support for family members once in host country (Brown, 2008; Konopaske & Werner, 2005; Sarkiunaite & Rocke, 2015).

5.4 Distance from Home Country

As expatriates, participants in this study reported some factors associated with the distance between Durban as the host city and their respective home countries as affecting their ability to adjust successfully. Real physical distance measures have not yet been included in expatriate adjustment literature and most studies have relied on perceptions of cultural novelty to assess home and host country (Bhaskar-Shrinivas et al., 2005; Tahir and Chamas, 2019). The concepts found in expatriate adjustment literature is cultural distance and psychic distance.

Cultural distance is the differences between national cultural norms and values degree to which countries differ in their cultural values (Pinto, 2010). Psychic distance is defined as an individual's perception of differences between their home country and the foreign country (Bhaskar-Shrinivas et al., 2005; Jenkins & Mockaitis, 2010; Pinto, 2010). Viewing the issues participants brought up related to distance- lack of familial support, and inability to maintain former social connection as related to psychic distance rather than physical distance brings in individual perception/appraisal as a mediating factor to adjustment.

Distance related factors do not inherently cause stress or hinder adjustment, but rather how individuals perceive the differences they are facing in the host country compared to their home country. The factors described by participants- support and social connection while valid, could have been mitigated by forming new social connections in Durban and creating support systems among friends, colleagues etc.

5.5 Uncertainty about expatriate assignment

All participants in this study mentioned that living as an expatriate often meant that they were not in charge of the duration or location of their assignment which impacted their personal and social lives. The two main issues participants were uncertain about is the repatriation plans and the length of the assignments.

Brown (2008) cited repatriation as the third major stressor that expatriates and their families face, a claim supported by other researchers (Edmond, 2002; Konopaske &

Werner, 2005; Krell, 2013; Zhou, 2015). Repatriation refers to the process of bringing overseas employees back to their home country (Edmond, 2002). The lack of a good repatriation plan causes job insecurity which can lead to feelings of anxiety, psychological distress and lower job performance (Brown, 2008; Edmond, 2002). Saquib et al. (2020) assessed expatriate nurses in Saudi Arabia and found that job insecurity, was significantly correlated with depression, anxiety and stress among expatriates.

For the expatriate, they often are concerned about their career projections post the assignment. Research on the willingness of managers to accept global assignments revealed that they concerned with being away from home for too long as the “out of sight, out of mind” principle can affect the expatriate’s career projections after the international assignment (Konopaske & Werner, 2005). More researchers are in favour of shortening the length of the assignments to mitigate this (Konopaske & Werner, 2005; Krell, 2013). There is still value in the expatriate model, however companies need to flexible about how their assignments work to ensure that the employees are well adjusted. Alternatives to the traditional long term assignments include: virtual collaboration, commuter assignments, extended business travel and having international full time hires (Krell, 2013). Shorter assignments may also positively affect the decisions accompanying spouses make about their own careers. Brown, (2008) suggests that expatriate couples ensure they ask as many questions as possible and encouraged companies to offer training. Most individuals may know that an assignment involves personal and cultural adjustment but few are aware of the prevalence and stressors associated with expatriate adjustment (Brown, 2008). Giving expatriates this information can go a long way in facilitating a positive and more accurate appraisal of the assignment for the expatriate and their family thereby reducing stress and other psychological strain (Bhaskar-Shrinivas et al., 2005; Jenkins & Mockaitis, 2010; Pinto, 2010).

5.6 Previous Expatriate Assignment

As reported in the findings chapter above, half of the participants interviewed had previous expatriate experience and cited this as a factor that positively influenced their adjustment. Previous experience served two main purposes: providing a good basis of

comparison and some knowledge about what to expect in the relocation and adjustment process.

Literature supports these findings; Brown (2008); Kornapske & Werner (2005); Sarkiunaite & Rocke (2015) and Tahir and Chamas (2019) identified previous expatriate experience as one of the five dimensions necessary for expatriate adjustment and more current research indicate experience positively correlates to adjustment in a foreign country (Tahir & Chamas, 2019). Zhu et al (2016) in their paper agree that workers who had previously relocated cope and adapt quicker to subsequent assignments which fastens the adjustment process and in turn results in less failure rates. Previous experience acts as an anticipatory factor, giving individuals a good sense of what lies ahead, and helps to reduce the initial uncertainty associated with a big move (Zhu et al. 2016). The expatriate is able to have more realistic expectations of what is to come as seen in the participants' responses who had been to Durban; they could predict some challenges and quickly adjusted to them.

Tying this to coping literature, expatriates who have been previously assigned internationally have built up coping strategies (Bhugra, 2004) which makes dealing with adjustment challenges later easier. It should be noted the participants with previous experience in the study still experienced stress and adjustment challenges after moving to Durban. Knowing what lies ahead does not eliminate the stressors but rather increases one's coping potential (Bhugra, 2004). The expatriates with experience, could accurately evaluate the situation and generate appropriate behavioural or cognitive changes. These changes then lead to better adjustment and coping both in the workplace and in their personal life.

5.7 Support systems

This section of the discussion will discuss both formal and informal forms of support the participants received or sought out. Examples of formal support include the relocation services, or any pre-departure assistance made available while informal is the support received from friends and/or family members.

Most of the participants interviewed received some form of assistance and support from the companies they worked for before and after the relocation process. Arthur and Bennett (1995) identified pre-departure training and support, among others as a

dimension of adjustment. Pre-departure training or support allows for anticipatory adjustment which facilitates reduction of stress (Fukunda and Chu, 1994; Tahir & Chamas, 2019) Examples of anticipatory adjustment include temporary posting abroad and an in-house cultural awareness program (Fukunda & Chu, 1994). All individuals who received this support, either in the form of the “pre assignment visit” or psychological services (provided by one company only) noted these efforts alleviated stress (van der Bank & Rothman, 2006) as they felt that they had some knowledge of what to expect.

One individual was offered psychological services prior to arrival in Durban which she was informed was to help her better understand herself and her coping strategies. This is explained best by Lazarus’ concept of appraisal; because there was some prior knowledge of what was expected, the participants were able to appraise the move as non-threatening and therefore adjusted better. The company support also increased their external coping resources which enabled effective adjustment. There are however some individuals who found that the company services provided were not beneficial to them. They noted that this addressed some needs and would have preferred to figure it themselves. This view, although the minority was documented in the results to showcase individual differences in the relationship between the environment and the individuals.

For most, the availability of support increased their cognitive and external resources thereby appraising the adjusting to Durban as non-stressful. For the two individuals who did not find the services beneficial, in their primary appraisal, there was no goal relevance, which is the degree to which an encounter addresses the issues the individual cares about. It could be that for them, it was not enough that there was a formal structure in place to assist their relocation, but it mattered more that their specific needs and preferences are looked at. This was not the case as more often; company services are standardised.

Social support was cited by all as being critical factor to the expatriates stay in Durban. Expatriate assignments involve life changes, considered a source of stress by Zhu and associates (2016), with relocation at a minimum and separation from family is likely to result in stress and research continues to confirm this relationship (Brown, 2008; Konopaske & Werner, 2005). Often participants befriended fellow expatriates who

were seen as going through similar experiences as them thereby sharing coping strategies among themselves (Kidane et. al., 2020).

5.8 Conclusion

This chapter discussed the study's findings by organizing them into two broad categories: challenges or stressors and facilitators of adjustment. The study findings are similar to existing literature. Factors that positively facilitated adjustment include previous experience and support systems available. Challenges and stressors encountered include cultural differences, family adjustment, the distance away from the expatriate's home country and the uncertainty of expatriate assignments significantly impact the expatriate's adjustment in their host country. The theme difficult visa processes was unique, and speaks to the need for more research on migration into African countries.

CHAPTER SIX

CONCLUSION

6.0 Introduction

This chapter covers the conclusions drawn from the current study, by presenting how the findings discussed in Chapter four, answer the research questions and achieve the objectives mentioned in chapter one. Additionally, study limitations and recommendations are included

6.1 Conclusion

The purpose of this present study was to examine and document the lived experiences of foreign nationals working and living in Durban South Africa. One of the study's objectives was to explore how foreign nationals adjust. Support systems, both company support and social support through individual's social networks were important in how individuals adjusted. Expatriates who had been on previous assignments also reported adjusting easily as they were generally aware of what to expect. These systems of support increased coping resources which in turn facilitated effective adjustment. Stressors identified among the expatriates studied included: cultural differences in the work and social setting, distance away from family and friends in home country, family adjustment, or lack thereof, and the uncertainties that come with expatriate assignments. The relationship between stress experienced and adjustment of the expatriate depended on their perspective and appraisal of their situations. This is evident in how each certain situation that was negatively appraised, lead to increased stress e.g. lengthy visa processes caused delays which participants reported as stressful and challenging. These delays however meant participants could remain longer in their home country, which was not seen as a positive, until after moving to Durban when being away from their home and family was an additional stressor.

The findings of this study support the transactional model of stress used to analyse the themes generated; no one factor- other than visa application was viewed as a stressor affecting participants in the same exact way. To facilitate adjustment, organizations should focus on equipping individuals with increased access to resources, emotional

and psychological support in order for them to positively appraise stressors and increase coping.

6.2 Recommendations

More research needs to be done on increasing family support and assessing the impact visa application challenges have on expatriates. This is especially relevant to intra-Africa migration as there is increased movement across African countries. The South African immigration process poses huge challenges to the flow of movement, even for foreign nationals wanting to go through the legitimate legal routes. It would be recommended that organizations make pre-departure training and psychological support the norm and not the exception. This could contribute to adequately preparing expatriates and their families and reduce the uncertainty many expatriates feel.

In this study, seven of the ten participants were from developed countries and three from African nations. Future research could focus on critically analysing coping and stress of individuals based on country of origin and how it can shape the migration experience.

Although the factors listed above were broadly categorized as facilitators and barriers, some factors were experienced as both facilitators and hindrances to the expatriates' adjustment to their workplace and personal life. This is in line with coping theory which was used to discuss the findings. All the various factors mentioned above did not inherently induce stress, rather it was the expatriates' appraisal of them as life threatening or challenging that determined what a stressor was.

6.3 Limitations

The findings of this study may not be generalizable given the small sample size and the data collected from expatriates found through purposive sampling. The small sample size limits the applicability of the results therefore it is important to note that the findings apply to expatriates living and working in Durban. Individuals in other parts of the country may have different experiences all dependent on their cultural background, socio-economic status and geographic location. This potentially limits the comparison or applications of findings that can be made between the current study findings and others across different countries.

The definition of an expatriate in this study was limited to individuals sent by organizations to manage or cooperate with others on an international assignment for a period of time (Zhou, 2015). There are many broader categories of expatriates for example self-initiated expatriates- individuals, mostly in the academic field who migrate of their own choice to work in a foreign country (Selmer & Lauring, 2011). Ngwenya (2010) also argues that anyone who leaves their country of origin to work in another country, no matter the circumstance can be termed an expatriate. Expatriates who do not fall into the definition adopted in this study can differ in socio-economic background therefore the findings of these study should be applied with caution.

Additionally, there findings could be at risk of researcher bias as the researcher in this study was a foreigner and came into Durban, South Africa as a family member of an expatriate. A reflexive approach was maintained (Pillow, 2003) as the researcher, through supervision continuously questioned her motivations, questions and assumptions throughout the research process. The researcher's foreigner status was only disclosed and leveraged build and maintain rapport during the interview process as and when necessary.

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APPENDICES

A. ETHICAL APPROVAL



12 January 2018

Miss Sarah Adhiambo Okumu 212552867
School of Applied Human Sciences
Howard College Campus

Dear Miss Okumu

Protocol reference number: HSS/2171/017M

Project title: Examination of the stress and adjustment challenges experienced by foreign nationals working in Durban, South Africa

Full Approval – Expedited Application

In response to your application received 8 November 2017, the Humanities & Social Sciences Research Ethics Committee has considered the abovementioned application and the protocol has been granted **FULL APPROVAL**.

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for a period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

.....
Dr Shamila Naidoo (Deputy Chair)
Humanities & Social Sciences Research Ethics Committee

/pm

cc Supervisor: Mtombekhaya Mtshembu
cc Academic Leader Research: Dr Jean Steyn
cc School Administrator: Ms Ayanda Ntuli

Humanities & Social Sciences Research Ethics Committee

Dr Shenuka Singh (Chair)

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B. IRB AMENDMENT APPROVAL



02 November 2021

Sarah Adhiambo Okumu 212552867
School of Applied Human Sciences
Howard College Campus

Dear SA Okumu

Protocol reference number: HSS/2171/017M

Project title: Examination of the stress and adjustment challenges experienced by foreign nationals working in Durban, South Africa

Amended title: Exploring the experiences of foreign nationals living and working in Durban, South Africa

Approval Notification – Amendment Application

This letter serves to notify you that your application and request for an amendment received on 27 October 2021 has now been approved as follows:

- Change in title

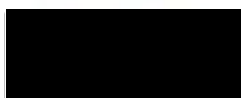
Any alterations to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form; Title of the Project, Location of the Study must be reviewed and approved through an amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

All research conducted during the COVID-19 period must adhere to the national and UKZN guidelines.

Best wishes for the successful completion of your research protocol.

Yours faithfully



Professor Dipane Hlalele (Chair)

/dd

cc Supervisor: Ntombekhaya Mtwentula
cc Academic Leader Research: Dr Jean Steyn
cc School Administrator: Ms Ayanda Ntuli

C. INVITATION TO PARTICIPATE IN RESEARCH LETTER

Applied Human Sciences,
College of Humanities,
University of KwaZulu-Natal,
Howard Campus.

Dear potential participant,

My name is Sarah Okumu; I am studying towards a Masters of Social Science in Clinical Psychology from the University of KwaZulu Natal, Howard College Campus. South Africa. You are invited to participate in a study **examining the stress experienced by foreign nationals working in Durban, South Africa and how this influences personal adjustment and integration into the social sphere and/or workplace.**

This research project forms my Dissertation, which is a necessary requirement of the completion of my Masters degree. You have been identified as an expatriate worker. To gather the information, I am interested in asking you some questions centered on getting an in depth understanding of experiences of your life as an expatriate in Durban.

Please note that:

Your confidentiality is guaranteed as your inputs will not be attributed to you in person, but reported only as a population member opinion

The interview will last approximately 20 minutes and may be split depending on your preference

Any information given by you cannot be used against you, and the collected data will be used for purposes of this research only.

Please feel free to contact me regarding any additional information. I can be contacted at:

Email: sarah.okumu@gmail.com

Cell: 079 790 2438 or 031 502 3263

Thank you for your contribution to this research.

D. PARTICIPANT INFORMED CONSENT FORM

Applied Human Sciences,
College of Humanities,
University of KwaZulu-Natal,
Howard Campus.

Dear Participant

INFORMED CONSENT LETTER

My name is Sarah Okumu; I am studying towards a Masters of Social Science in Clinical Psychology from the University of KwaZulu Natal, Howard College Campus. South Africa.

I am interested in an examination of the stress and adjustment challenges experienced by foreign nationals working in Durban, South Africa. You have been identified as an expatriate worker. To gather the information, I am interested in asking you some questions.

Please note that:

Your confidentiality is guaranteed as your inputs will not be attributed to you in person, but reported only as a population member opinion

The interview will last approximately 20 minutes and may be split depending on your preference.

Any information given by you cannot be used against you, and the collected data will be used for purposes of this research only.

Data will be stored in secure storage and destroyed after 5 years.

You have a choice to participate, not participate or stop participating in the research. You will not be penalized for taking such an action.

You will be asked questions centred on getting an in depth understanding of experiences of your life as an expatriate in Durban.

Your involvement is purely for academic purposes only, and there are no financial benefits involved.

If you are willing to be interviewed, please indicate (by ticking as applicable) whether or not you are willing to allow the interview to be recorded by the following equipment:

	Willing	Not willing
Audio equipment		

I can be contacted at:

Email: sarah.okumu@gmail.com

Cell: 079 790 2438 or 031 502 3263

My supervisor is Ntombekhaya Mtwentula who is located at the School of Applied Human Science, Howard Campus of the University of KwaZulu-Natal. Contact details:

Email: mtwentulan@ukzn.ac.za

Phone number: 031 2601087

You may also contact the Research Office through:

P. Mohun

HSSREC Research Office,

Tel: 031 260 4557 E-mail: mohunp@ukzn.ac.za

Thank you for your contribution to this research.

E. INTERVIEW SCHEDULE

Topic: Examination of the stress and adjustment challenges experienced by foreign nationals working in Durban, South Africa

Introduce self

Orient the respondent to the aim and purpose of the study, ensure they understand their ethical rights and collect completed informed consent forms from them.

Questions to be asked:

1. Have you or any of your family members encountered any difficulties in matters regarding government departments, e.g. visa applications?
2. Did you find it easy to find suitable accommodation and transport upon arrival to Durban?
3. When did you arrive and for how long have you been staying in Durban?
4. How would you describe the process you underwent in finding access to daily amenities in Durban?
5. Is there any time you have encountered a language barrier in your interactions either at work or socially? If so, how did you manage this?
6. Has your continued stay in Durban been facilitated?
7. Have you and your family encountered any significant stressors and challenges in your continued stay in Durban?
8. What support structures are available to you?
9. In your opinion, what could make the adjustment as a foreign national in Durban easier?
10. Do you have any additional comments or questions regarding the interview?