The Influence of the Taiwanese on Expatriate Adjustment and Intent to Stay in Overseas Assignment

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ABSTRACT

The purpose of this study is to explore the interplay of the socio-cultural factors as they affect the Taiwanese expatriate's adjustment when they live in the U.S. Questionnaires were mailed to HR Department in 93 subsidiaries which were all selected from TSEC (Taiwan Stock Exchange Corporation) Market in Taiwan. A total of 186 subjects were asked to respond to the questionnaire. The results indicated that language proficiency, foreign experience, establishing relationship, willingness to communicate and social support were related to expatriates' adjustment to the host culture. Family support and satisfactory adjustment were related to intent to stay in the overseas assignment. Culture novelty and living conditions were related to socio-culture adjustment. With intentions of keeping expatriates adjustment, support networks will have to provide appropriate introductions in the local society to activities that are of interest to the expatriate. Equally important, establishing relationship and communication can be effective factors of ensuring potential success in socio-cultural adjustment.

Key Words: expatriates, Taiwanese expatriate, socio-cultural adjustment, cultural adjustment

INTRODUCTION

The business environment has made internationalization a growing strategic option for organizations that want to create and sustain a competitive advantage. As Taiwanese firms expanded their foreign production or facilities into the U.S., they created a need for more and more expatriates. In 2002, Taiwanese corporations invested $578 (U.S.) million in the United States. In January 2004, the United States was Taiwan's second largest trading partner, with bilateral trade reaching $33.3 (U.S.) billion. Taiwan is the eighth-largest U.S. trading partner (Bureau of Foreign Trade, 2004). The U.S. is now very important to many Taiwanese business firms. Many companies sent expatriates on overseas assignments to implement their global strategies and to control and co-ordinate their subsidiaries. However, international assignments do not come cheap. On an average, the cost of expatriates is two to three times that of nationals (Black & Gregersen, 1999). A fully loaded expatriate package costs from $300,000 to $1 million annually (Selmer, 1998; Black & Gregersen, 1999). The high failure rate, 20%-40%, was experienced because of expatriate's adjustment problems (Tung, 1981; Black, 1988; Mendehall & Oddou, 1985); and almost a quarter leave the parent company within one year of repatriation (Mendehall & Oddou, 1985; Black & Greersen, 1999).

Due to the high frequency of expatriate failure and the associated costs, the international business should study the factors causing difficulty in the overseas adjustment. Most of the studies examine cross-cultural adjustment (Black & Gregersen, 1991a; Church, 1982; Mendenhall & Oddou, 1985; Black, et al., 1991; Black, 1988), The researches on expatriate adjustment have contributed to our understanding and management of the problems contributing to their failure. It is imperative for Taiwanese multinational companies to develop, and help expatriates acquire global knowledge and experience.

PURPOSE OF THE STUDY

The purpose of this study is to explore the socio-cultural adjustment that influence the Taiwanese expatriates when they live in the U.S. The study explored the socio-cultural adjustment factors of the Taiwanese expatriates in the U.S., providing businesses and related units with a guide for evaluating the expatriate's adjustment, and increasing management's knowledge of practices and of employee behaviors in different countries.

LITERATURE REVIEW

It is important to develop and retain expatriates who possess global knowledge and experience in international business. Organizations have used several methods to help expatriates acquire global knowledge and experience. One of the methods is to have expatriates live and work in multicultural groups where members have diverse cultural backgrounds (Adler, 1984). However, the failure rate commonly fell in the 20% - 40% range for expatriates' transfers because of poor performance or the inability of the employee or the family to ineffectively adjust to the foreign environment (Tung, 1981; Black, 1988; Mendehall & Oddou, 1985). Moreover, there are few key studies in Taiwan on the overseas adaptation of Taiwanese expatriates working at Taiwanese subsidiary companies in the U.S. Therefore, understanding the consequences for the adjustment might help organizations find a way to reduce the failure of the international assignment by improving the adjustment process for expatriates.

Adjustment Theory

Adjustment was the most important thing for an expatriate when an expatriate lived in another culture or country for some period of time. Berry (1992) proposed a definition of adjustment as a state of change occurring in the individual in a direction of increased fit and reduced conflict between the environmental demands and the individual attitudinal and behavioral inclinations. For expatriation, Aycan (1997) defined adjustment as "conceptualized as the degree of fit between the expatriate manager and the environment in both work and non-work domains" (p. 436). Such a fit was marked by reduced conflict and stress and increased effectiveness. Selmer et al. (2000) argued that expatriate adjustment referred to "the expatriate's ability to negotiate interactive aspects of the host culture measured by the degree of difficulty experienced in managing day-to-day situations in the host culture" (p. 238). Black et al. (1991) proposed that adjustment was the individual's ability to get along with and effectively interact with host nationals, new culture, and new environment.

Ward & Kennedy (1992) presented two types of international adjustment: socio-cultural adjustment and psychological adjustment. Socio-cultural adjustment in three areas was important for expatriate success: work adjustment, interaction adjustment, and non-work adjustment (Black 1988; Shaffer & Harrison 1998; Black et al., 1991; Mendenhall, & Oddou, 1985). Psychological adjustment, called sense of well-being, is feeling reasonably happy all things considered, being able to enjoy one's day-to-day activities, being able to face up to one's problems (Ward & Kennedy, 1992). In terms, adjustment was the psychological comfort and familiarity an individual feels for the new culture. Interaction adjustment was defined as feeling that one could interact effectively with host country nationals outside of work. Non-work adjustment was defined as feeling comfortable with local food, health care facilities, entertainment and recreation opportunities, shopping, and housing conditions and living conditions in general. Black et al. (1991) focused on socio-cultural adjustment and suggested that pre-departure training, previous international experience, culture novelty, and family and spouse adjustment all play a role. In terms, adjustment was the individual's ability to get along with and effectively interact with host nationals (Black et al., 1991).

Researches (Black, 1988; Shaffer & Harrison, 1998; Black, et al., 1991; Mendenhall & Oddou, 1985) on international adjustment focused on variables that influence the degree to which adjustment was achieved in the adjustment. Black (1988) proposed that the degree of adjustment could be viewed as both a subject and object concept. Subjectively, it was the degree of comfort the incumbent felt in the new role, and the degree to which he or she feels adjusted to the role requirements. Objectively, it was the degree to which the person had mastered the role requirements and was able to demonstrate that adjustment via his or her performance. When expatriates were sent on a foreign assignment, the degree of adjustment had been measured through self-reports of adjustment to the new country, new culture, and new environment (Torbion, 1982).

Social-Cultural Adjustment

Many companies sent expatriates on overseas assignments to implement their global strategies and to control and co-ordinate their subsidiaries. However, moving to a foreign country often involves changes in the job that the individual performed, and requires conforming to a corporate culture with new responsibilities. The expatriate must also

deal with unfamiliar norms relating to the general culture, living conditions, weather, food, new customs and foreign language on a daily basis (Black, et al., 1991).

Research has highlighted several possible manifestations of poor expatriate socio-cultural adjustment, such as inadequate performance, inappropriate behaviors, and the negative influences of the expatriates' family (Mendunhall & Oddou, 1985; Black et al. 1991; Church, 1982; Shaffer, et al., 1999; Tung, 1982; Hays, 1971; Black, 1988). Black and his colleagues (Black, et al., 1991; Black, 1988; Mendenhall, & Oddou, 1985) stated the three facets of expatriate adjustment were work adjustment, general adjustment, and interaction. Work adjustment referred to the expatriate's psychological comfort with the tasks of the foreign assignment. General adjustment referred to the comfort with the general living conditions and culture of the foreign country. Interaction adjustment referred to the ability to communicate with the host-country nationals.

Black and research developed a measure of expatriate adjustment. First, individual factors, such as previous host-culture knowledge (Black, 1988; Tung, 1988; Caligiuri, et al. 1999), and host-language ability (Mendnhall & Oddou, 1985; Nicholson & Imaizumi, 1993; Naumann, 1992) are important, since they relate to expatriate's antecedent of adjustment. The second, Mendenhall and Oddou (1985) proposed that an expatriate's successful acculturation is the "others-oriented" dimension. This dimension encompassed activities and attributes that enhanced the expatriate's ability to interact effectively with host-nationals. It consisted of two factors: (1) relationship development and (2) willingness to communicate. The third factor was socio-cultural factors. Socio-cultural adjustment indicated how well an expatriate fit into the host culture (Ward & Kennedy, 1992). Mendenhall and Oddou (1985) pointed out that expatriate interaction adjustment was also related to socio-cultural adjustment. The focus in socio-cultural adjustment was organizational support for cross-culture training (Shaffer & Harrison, 1998; Harvey, et al., 1999). The third factor also included general adjustment to culture novelty and the degree of family problems. Black et al. (1991) proposed two non-work factors: culture novelty and the expatriate's spouse and family. Both culture novelty and spouse/family adjustment had been fund to be significant to expatriate adjustment (Black, et al. 1991; Mendenhall & Oddou, 1985; Church, 1982; Black & Stephens, 1989; Harvey, 1985). However, family adjustment also affects individual factors. Research shows that a lack of expatriate adjustment and family adjustment are the leading causes of failure (Black & Stephens, 1989; Black & Gregersen, 1991a; Tung, 1988). These studies focused on the problems of expatriate adjustment and understanding their causes and explained how and why expatriates have difficulty adjusting to overseas assignments (Black, et al., 1991).

In order to advance the research of expatriate adjustment, the study examined several antecedents of expatriate adjustment such as host language factors (Mendnhall & Oddou, 1985; Nicholson & Imaizumi, 1993; Dolainski, 1997; Black 1990; Abe & Wiseman 1983), previous foreign experience and work experience (Black & Gregersen, 1991a, 1991b; Naumann, 1993; Shaffer, et al., 1999; Caligiuri, &Lazarova, 2002; Aycan, 1997), and pre-departure cross-cultural training (Gregersen & Black,1992; Black & Mendenhall, 1990; Mendenhall & Oddou, 1985; Ashamalla, 1998; Caligiuri, & Lazarova, 2002); In-country expatriate adjustment included individual adjustment (e.g. relationship development, willingness to communicate), socio-cultural adjustment (e.g. social support, , culture novelty, family situations adjustment (Selmer, 1998; Black, et al., 1991; Mendenhall, & Oddou, 1985). (See Fig. 1).

METHODOLOGY

Sample

Questionnaires were mailed to HR Department in 93 subsidiaries which were all selected from TSEC Market (Taiwan Stock Exchange Corporation) (www.tse.com.tw/market/conpany/listed.htm) in Taiwan. The HR manager was then asked to select two employees who have been expatriated from Taiwan to U.S.A. This convenience sample was the limitation of non random selection. A total of 186 subjects were asked to respond to the questionnaire. The response rate is 25.26.
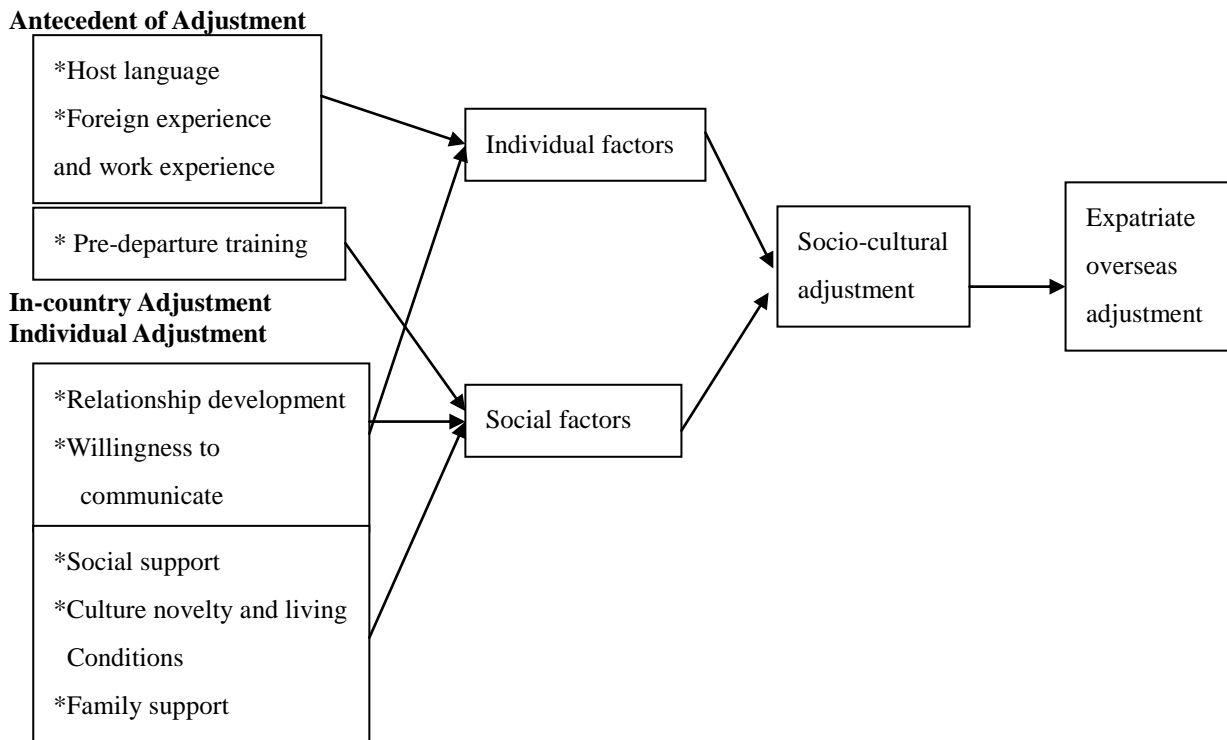
Antecedent of Adjustment

| *Host language |
| *Foreign experience |
| and work experience |

| * Pre-departure training |

In-country Adjustment
Individual Adjustment

| *Relationship development |
| *Willingness to |
| communicate |

| *Social support |
| *Culture novelty and living |
| Conditions |
| *Family support |

Individual factors

Social factors

Socio-cultural adjustment

Expatriate overseas adjustment

Figure 1: Examining a Concept of Expatriate Adjustment

Limitations

The focus on expatriates in this study will question the ability to generalize from these results. The generalizations of the findings from this study were limited to sample groups. Although a great deal of effort was expended to insure the reliability of this research, there are a few limitations to this study.

1. The study could not control the selection of the survey respondents, due to the fact that this was done internally in each company..
2. The data collection was limited to a personal self-report technique.
3. The data collection was limited to the expatriate only, family members were not included.

Hypotheses

The hypotheses in this study seek to answer how and why expatriates have difficulty with adjustment to overseas assignments (See Fig. 2).

H_1: Expatriates' proficiency in the host language is positively related to socio-cultural adjustment.

H_2: Expatriates' previous foreign experience is positively related to socio-cultural adjustment.

H_3: Establishing relationships with host nationals is positively related to socio-cultural adjustment.

H_4: The willingness to communicate with host nationals is positively related to socio-cultural adjustment.

H_5: The family support is positively related to expatriates' intentions to stay overseas.

H_6: The Company's pre-departure training is positively related to socio-cultural adjustment.

H_7: Social support from the host country is positively related to socio-cultural adjustment.

H_8: Perceived culture novelty is negatively related to expatriates' socio-cultural adjustment.

H_9: Living conditions in the host country are positively related to socio-cultural adjustment.

H_{10}: Satisfactory socio-cultural adjustment is positively related with intent to stay overseas assignment.

H_{11}: There are no differences in social adjustment scores between age groups (20-30), (31-40), (41-50), and (over 51).

Social adjustment factors
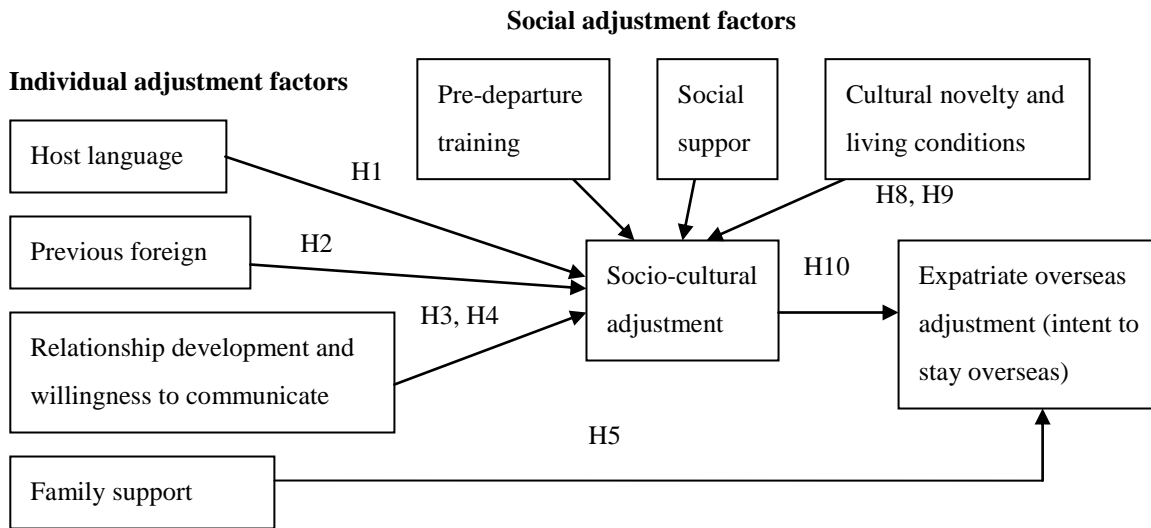
Individual adjustment factors

Figure 2: Hypothesized Relationships in the Study of the Expatriate Adjustment

Measure

The questionnaire was organized into two parts. The first part was demographics. The second part was expatriate adjustment: socio-cultural adjustment, and intent to stay overseas. 6 Likert-type scales were used to measure the variable. Cronbach's alpha was used to measure the internal consistency of the instruments in this study. The total reliability coefficient alpha is 0.8922. The correlated variables exhibited a significant ($P<0.05$, 2-tailed), and correlated relationship with socio-cultural adjustment. The regression technique was used to analyze relationship between the dependent variables and independent variables. A 95% confidence level was utilized.

Analysis

In this study, 18 respondents (40%) were 51 years old and above, and 37.8% were in the age group of 41-50 years; only 2 respondents (4.4%) were in the age group of 20-30. Also, 91.1% of the respondents were male; 8.9% were female. The largest group of job level was manager, which was 62.2% of the total respondents.

Five (5) respondents (11.1%) were technician. A large number of the participants, 62.2%, had been in country of assignment for two years. Only 4 respondents (8.9%) were under one year. Additionally, 37.8 % of the participants responded that no children came with expatriates. Twenty-five (25) respondents, 55.6% of the total respondents, had taken training program before they came to the U.S.

The result of correlation coefficient between host language and socio-cultural adjustment was r = .375, with a significance level of .011 (see Table 1); The R square=.141; Adjusted R square =.121; The β coefficient=.375 (see Table2). The correlation between previous foreign experience and socio-cultural adjustment was r =.357; P= .016 (see Table 1); R square= .128; the adjusted R square=.107; The β coefficient =.357 (see Table2). The result of relationship correlation coefficient was r =.523; communication correlation coefficient was r = .351, with a significance level of .000 and .018 (see Table 1). The R square was .274 and .123. The adjusted R square of relationship and communication was .257 and .103. The β coefficients were .523 and .351(see Table2). The correlation between family support and expatriates' intentions to stay in the overseas was r =.360, with a significance level of .015 (see Table 1); the R square=.129; the adjusted R square=.109; the β coefficient=.36(see Table2). The result of correlation coefficient between pre-departure training and socio-cultural adjustment (r = -.149, P= .328) did not support this hypothesis (See Table 1). The alternative hypothesis must be rejected. The result of correlation coefficient between social support and socio-cultural adjustment was r =.306, with a significance level of .041(see Table 1); the R square=.094; the adjusted R square=.073; the β coefficient=.306(see Table2). The correlation between perceived culture novelty and socio-cultural adjustment was r=.299, P= .046(see Table 1), the correlation between living conditions and socio-cultural adjustment was; r = .312, P = .037(see Table 1). The R square was .090 and .097. The adjusted R square was .068 and .076; the β coefficients were .299 and .312(see Table2). The correlation between satisfactory socio-cultural adjustment and

expatriates' intentions to stay in the overseas was r = .294, with a significance level of .050(see Table 1); the R square=.086; the adjusted R square=.065; the β coefficients =.294(see Table2). The differences between social adjustment and the groups of age was F (3, 41) = .405, p =.75; F (3, 41) = .558, p=.646). The multiple regression equation of socio-cultural adjustment was highly significant (F (2, 42) = 10.803, p = 0.000) (see Table 3). The R square=.340; the adjusted R square=.308; the β coefficients=.470 on relationship (t=3.673, P= .001) and .262 on experience (t=2.050, P= .047) (see Table 3).

TABLE 1: Correlations among Socio-Culture Adjustment (N = 45)

	Mean	SD	1	2	3	4	5	6	7	8	9	10
1. Culture Adj.	4.87	.405	1									
2. Language	5.6	.539	.375*	1								
Sig. (2-tailed)			.011									
3. Experience	4.87	.661	.357*	.102	1							
Sig. (2-tailed)			.016	.505								
4. Relationship	5.07	.580	.523**	.305*	.202	1						
Sig. (2-tailed)			.000	.042	.184							
5. ommunication	5.00	.640	.351*	.329*	.377*	.490**	1					
Sig. (2-tailed)			.018	.027	.011	.001						
6. Family	5.16	.673	-.006	.363*	-.003	.148	.42**	1				
Sig. (2-tailed)			.971	.014	.982	.333	.004					
7. Training	46.76	47.2	-.149	.003	-.091	-.102	-.138	.197	1			
Sig. (2-tailed)			.328	.983	.554	.504	.367	.194				
8. Support	4.84	.562	.306*	.165	.310*	.381**	.253	-.055	.090	1		
Sig. (2-tailed)			.041	.279	.038	.010	.094	.721	.556			
9. Culture Novelty	4.89	.438	..299*	.289	.026	.298*	.081	-094	-285	.205	1	
Sig. (2-tailed)			.046	.055	.864	.047	.596	.538	.058	.177		
10. Living	4.80	.505	.312*	.200	.259	.357*	.352*	.228	-.35*	.208	.206	1
Sig. (2-tailed)			.037	.187	.086	.016	.018	.133	.016	.170	.175	

* Correlation is significant at the 0.05 level (2-tailed).
** Correlation is significant at the 0.01 level (2-tailed).

TABLE 2: Summary of Regression Analysis for Variables Predicting Socio-Cultural Adjustment

	R	R Square	Adjusted R Square	Standardized Coefficients β	t	F	Sig.
Language	.375	.141	.121	.375	2.653	7.036	.011
Experience	.357	.128	.107	.357	2.508	6.290	.016
Relationship	.523	.274	.257	.523	4.025	16.20	.000
Communication	.351	.123	.103	.351	2.461	6.056	.018
Training	.149	.022	.000	-.149	-.989	.978	.328
Social Support	.306	.094	.073	.306	2.11	4.456	.041
Culture Novelty	.299	.090	.068	.299	2.057	4.229	.046
Living	.312	.097	.076	.312	2.152	4.631	.037

TABLE 3: Summary of Multiple Regression Analysis for Socio-Cultural Adjustment

	R	R Square	Adjusted R Square	Standardized Coefficients β	t	VIF	F	Sig.
Socio-culture Adjustment							10.803	.000
Model 1	.523	.274	.257				16.200	.000
Relationship				.523	4.025	1.000		.000
Model 2	.583	.340	.308				10.803	.000
Relationship				.470	3.673	1.042		.001
Communication				.262	2.050	1.042		.047

RESULT

The data reveals that language proficiency, previous foreign experience, establishing relationships, willingness to communicate, family support, social support, role novelty, role ambiguity, role conflict, and role discretion appear to impact the expatriate's adjustment process. The study found when Taiwanese are expatriated their first consideration was family because Taiwanese enjoyed family life. Therefore, family support was an important and positive influenced in an expatriate's intention to stay in the overseas assignment. The pre-departure training did not help expatriates rapidly adjust to the new culture and to be effective in the new roles. According to Caligiuri et al. (2001) and Black and Mendenhall (1990), if pre-departure training is done correctly, the training will enable the expatriate to behave appropriately and interact well with host nationals in the host country. The study found the pre-departure training programs probably needed to be updated and provided more realistic expectations for the expatriates with respect to their living and working conditions in the host country. The study also found only 25 respondents, 55.6% of the total respondents, had taken pre-departure training programs before they were expatriated. In other words, almost half of respondents, 44.4%, did not take any pre-departure training programs but they experienced good socio-cultural adjustment (Mean=4.87 on a 6-points Likert Scale;) in overseas assignment. They did feel that pre-departure training was important for them but it did not facilitate effective socio-cultural adjustment. Satisfactory socio-cultural adjustment and work adjustment were determinants of whether an expatriate completes his or her assignments.

RECOMMENDATION

The findings suggest that the expatriate adjustment is an interaction of many issues involved in individual factors and social factors at the overseas assignment. Individual factors found substantial criterion-related validity for socio-cultural adjustment. Social factors are significantly related to expatriate socio-cultural adjustment. These results suggest that firms may be well advised to implement policies and practices that provide support and encouragement to transferees on the job and off the job.

With intentions of keeping expatriates well adjusted, support services are encourage to provide appropriate introductions to the local society regarding activities that are of interest to the expatriate. Equally important, is the establishment of relationships and development of communication with the host nationals. These are effective factors for ensuring potential success in socio-cultural adjustment. The results provide some insights into selecting employees to be sent overseas. Organizations need to consider not only the employee's capabilities to perform his/her tasks, but also they need to assess his/her knowledge of the host country and their language proficiency. In addition, an expatriate's willingness to communicate and establishing relationship with host nationals and family support should be taken into account.

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