

Copyright is owned by the Author of the thesis. Permission is given for a copy to be downloaded by an individual for the purpose of research and private study only. The thesis may not be reproduced elsewhere without the permission of the Author.

**RETURNING TO THE FAMILIAR, OR THE FOREIGN?  
EXPECTATIONS AND EXPERIENCES OF  
SELF-INITIATING REPATRIATE NEW ZEALANDERS**

A thesis presented in partial fulfilment of the  
requirements for the degree of

Doctor of Philosophy  
in  
Business

at Massey University, Auckland,  
New Zealand.

David Robert Ellis

2015

## Abstract

This study explores the expectations and experiences of self-initiating repatriate (SIR) New Zealanders. It builds theory based on empirical data from distinct ‘before’ and ‘after’ repatriation phases. This research has particular relevance to the contemporary context due to the pace and scale of international mobility, the competition for skilled labour, and the high volume of New Zealanders returning home to live and work.

The SIR field remains not only under-researched, but also insufficiently scoped, demanding further exploratory work. This study responds to this, utilising a qualitative, interpretivist approach. This is characterised by semi-structured interviews with 32 participants and analysis of their narrative fragments, to explore their pre-move motives and expectations, their post-move experiences, and the level of congruence between them.

In relation to repatriation motivation, the study identified a difficult and frail decision to repatriate, incorporating frustration, relationship conflict, and reconciliation of positive and negative expectations. Participants formed expectations through an unbroken connection with New Zealand during expatriation, including maintaining social ties and remaining current in events. This continuous connection was enabled by visits to New Zealand, social media, and news feeds. Additionally, participants took proactive steps to further inform themselves about work and life in New Zealand before repatriating, resulting in a relatively high level of congruence between participants’ expectations and their experiences, in both work and personal domains. Where misalignment did occur, some represented positive surprises, such as the ease of securing employment, while others represented negative surprises, such as the exceptionally high cost of living relative to incomes. In addition, participants contributed perceived reasons for the relative ease of their repatriation experiences, including attributing it to luck.

The primary theoretical contribution of this study is that traditional reentry theory is not applicable to the contemporary SIR New Zealand context. The social information age now enables expatriates to remain better connected with their home countries. The effect of this is that many of the theory-positing ‘unexpected’ elements of home country life are no longer unexpected. The study therefore provides a necessary revision to reentry theory, which takes account of this technological age, and identifies that surprises and shocks occur much earlier in the repatriation process, often before the move home itself. This suggests a consequent reduction in repatriation adjustment difficulties. Further, it is likely that the continued rise of the information age is such a significant development that it necessitates a revision of international mobility theory.

## Acknowledgments

This study and thesis would not have been possible without the support and input of many people.

I am particularly grateful to my two supervisors, Professor James Arrowsmith and Dr Kaye Thorn. Jim and Kaye had no hesitation in taking me on as a doctoral candidate, despite our considerable geographical distance. A sincere thanks to you both for your frequent contact, your time spent with me during my trips to New Zealand, and your constructive feedback, which sharpened my thinking and contributed greatly to the quality of this research. I am also appreciative of the international connections you helped me forge, including Professor Valeria Pulignano of KU Leuven, Belgium, who provided local supervisory support during the early stages of this project. In addition, Professor Maddy Janssens of KU Leuven was a helpful sounding board in relation to research methodology, while Dr Matthias Walther of University of Bamberg, Germany, was a friendly and supportive ear during my time studying in Brussels.

I also acknowledge the assistance of the School of Management at Massey University in New Zealand. The then-HOD Professor Claire Massey provided immense practical support during my pre-enrolment stage, while Dr Karl Pajo provided valuable mentorship during this time. Without this support I am unlikely to have embarked on this journey, and I am grateful to you both. I am also thankful for the friendship and support readily offered to me by my fellow PhD students, especially Dr Christian Yao in Auckland, and Tanya Jurado in Brussels.

Thank you, too, to the many people and organisations, both in New Zealand and elsewhere, who helped promote this study to prospective participants. And to the participants themselves, thank you for your stories, reflections and openness at each stage of this project. The interview timings fell at two notoriously challenging and busy points for internationally mobile people; as pre-move preparations were being made, and relatively soon after resettlement. I do not underestimate the effort involved in prioritising speaking with me at these stages of your lives.

Finally, I give my heartfelt thanks to my family, and in particular my parents, for always being interested in this project, and for encouraging me throughout the journey. To my partner Jeroen van der Lans, we are now living in our fifth country together, and our experiences as expats, as well as those of the expats and repats we have met, provided much of the inspiration for this study. Jeroen, your support and love enabled me to undertake this study, and to complete it. Thank you.

**This research was supported by a Massey University Doctoral Scholarship**

# Table of Contents

<b>Abstract</b> .....	<b>i</b>
<b>Acknowledgments</b> .....	<b>ii</b>
<b>Table of Contents</b> .....	<b>iii</b>
<b>List of Figures</b> .....	<b>viii</b>
<b>List of Tables</b> .....	<b>ix</b>
<b>Chapter One</b> .....	<b>1</b>
<b>Introduction</b> .....	<b>1</b>
1.1 Background of the Study .....	1
1.2 Research Aims and Significance .....	3
1.3 Theoretical and Empirical Perspectives.....	4
1.4 Research Approach.....	6
1.5 The Researcher’s Selection of the Study Topic.....	8
1.6 Overview of the Thesis.....	8
<b>Chapter Two</b> .....	<b>10</b>
<b>International Mobility Literature</b> .....	<b>10</b>
2.1 Introduction and Literature Identification .....	10
2.2 Self-Initiated Repatriation .....	12
2.3 Theories of Reentry Adjustment.....	17
2.3.1 Reacculturation and Reverse Culture Shock .....	17
2.3.2 Expectations Theories.....	21
2.3.3 Cultural Identity Theories.....	23
2.4 IA Repatriation .....	25
2.4.1 Expectations.....	26
2.4.2 Outcomes and Contingencies .....	28
2.4.3 Managing Repatriation Adjustment.....	30
2.5 Expatriation.....	33
2.5.1 International Assignments (IAs).....	34

2.5.2 Self-Initiated Expatriation .....	36
2.6 The Wider Mobility Literature .....	42
2.7 Conclusion and Research Questions.....	46
<b>Chapter Three .....</b>	<b>49</b>
<b>Research Design and Methodology.....</b>	<b>49</b>
3.1 Introduction.....	49
3.2 Research Philosophy and Approach .....	49
3.3 Sample Criteria and Construction.....	53
3.3.1 Sample Characteristics .....	56
3.4 Semi-Structured Interviews .....	59
3.4.1 Narratives and Narrative Fragments.....	60
3.4.2 Interview Content and Sequence .....	63
3.5 Data Analysis.....	65
3.5.1 NVivo CAQDAS Software .....	67
3.6 Critical Evaluation.....	69
3.7 Ethical Considerations.....	73
3.8 Conclusion.....	74
<b>Chapter Four .....</b>	<b>75</b>
<b>Expectations of SIR New Zealanders .....</b>	<b>75</b>
4.1 Introduction.....	75
4.2 Original Expatriation .....	76
4.2.1 Expatriation Motives .....	76
4.2.2 Expatriation Adjustment.....	78
4.3 Repatriation Motivation.....	83
4.3.1 Pulls .....	84
4.3.2 Pushes .....	86
4.3.3 Formation of Decision and Expectations.....	88
4.3.4 Decision Complexity, Difficulty and Frailty.....	92
4.4 Work and Career.....	94
4.4.1 Ease of Finding Work.....	94

4.4.2	Recognition of Skills and Experience .....	98
4.4.3	Remuneration.....	101
4.4.4	Work Culture Readjustment .....	103
4.4.5	Work-Life Balance .....	105
4.5	Non-Work .....	106
4.5.1	Lifestyle .....	106
4.5.2	Cost of Living.....	108
4.5.3	Cultural Readjustment .....	110
4.5.4	Social Reintegration .....	113
4.5.5	Negatives .....	115
4.5.6	Safety Net .....	116
4.6	Conclusion .....	117
 <b>Chapter Five .....</b>		<b>119</b>
 <b>Experiences of SIR New Zealanders .....</b>		<b>119</b>
5.1	Introduction.....	119
5.2	Immediate Outcomes .....	120
5.2.1	Movers and Non-Movers.....	120
5.2.2	Repatriation Logistics.....	122
5.3	Work and Career.....	124
5.3.1	Recognition of Skills and Experience .....	124
5.3.2	Job Search and Recruitment Agents.....	128
5.3.3	Remuneration.....	133
5.3.4	Work Culture Readjustment .....	134
5.3.5	Work-Life Balance .....	137
5.4	Non-Work .....	138
5.4.1	Lifestyle .....	139
5.4.2	Cost of Living.....	142
5.4.3	Readjustment .....	145
5.4.4	Social Reintegration .....	151
5.4.5	Explaining Initial Readjustment Outcomes.....	152
5.5	Elements of Expatriate Life Missed .....	160
5.5.1	Safety Net .....	164

5.6 Conclusion .....	166
<b>Chapter Six .....</b>	<b>169</b>
<b>Expectations - Experiences Congruence .....</b>	<b>169</b>
6.1 Introduction.....	169
6.2 Summary of Similarities .....	170
6.3 Summary of Differences and Surprises .....	173
6.3.1 Better than Expected.....	174
6.3.2 Worse than Expected.....	175
6.4 Explaining Similarities and Differences .....	176
6.4.1 Attribution .....	176
6.4.2 Advice.....	184
6.4.3 Individual Nature of Experiences .....	186
6.5 Conclusion .....	187
<b>Chapter Seven.....</b>	<b>189</b>
<b>Discussion.....</b>	<b>189</b>
7.1 Introduction.....	189
7.2 Mobility Motivation.....	192
7.3 Reentry Theory .....	197
7.3.1 Reacculturation Phases .....	198
7.3.2 Reverse Culture Shock .....	204
7.4 Expectations Theory .....	207
7.4.1 Other Attributions.....	210
7.5 Cultural Identity Theories.....	214
7.6 IA Repatriation Literature.....	216
7.7 SIR literature.....	219
7.8 Related New Zealand work .....	225
7.8.1 Academic Research .....	226
7.8.2 Mainstream Research .....	227
7.9 Conclusion .....	230

<b>Chapter Eight .....</b>	<b>233</b>
<b>Conclusions .....</b>	<b>233</b>
8.1 Introduction.....	233
8.2 Overview of the Study .....	233
8.3 Addressing Research Question One .....	234
8.4 Addressing Research Question Two.....	235
8.5 Implications of the Study.....	236
8.5.1 Theoretical Implications .....	236
8.5.2 Implications for Management.....	238
8.6 Limitations of the Study .....	241
8.7 Suggestions for Future Research .....	242
<b>References .....</b>	<b>244</b>
<b>APPENDIX A: Example of Call for Participants .....</b>	<b>264</b>
<b>APPENDIX B: Participant Information Sheet.....</b>	<b>265</b>
<b>APPENDIX C: List of Organisations Assisting with</b>	
<b>Participant Recruitment .....</b>	<b>267</b>
<b>APPENDIX D: Interview Topics .....</b>	<b>268</b>
<b>APPENDIX E: Ethics Approval Letter.....</b>	<b>269</b>

## List of Figures

Figure 2.1. U-Curve of Cultural Adjustment .....	18
Figure 2.2. W-Curve of Cultural Adjustment .....	19
Figure 2.3. Revisiting the Curves in a New Zealand Migrant / OE Returner Context .....	20
Figure 6.1. 'Luck' and 'Lucky' Word Tree .....	182
Figure 7.1. Expectations Themes .....	190
Figure 7.2. Experiences Themes .....	191
Figure 7.3. Revisiting the W-Curve in an SIR New Zealander Context.....	201
Figure 7.4. Factors Affecting Reverse Culture Shock .....	205
Figure 7.5. Tentative Expectations – Experiences – Impact Pathways for SIR New Zealanders.....	209
Figure 7.6. The Potential Influence of Connectedness and Personal Factors on SIR Readjustment and Outcomes.....	223

## List of Tables

Table 2.1. A Spectrum of Global Mobility, and Gap in SIR Knowledge .....	43
Table 3.1. Sample Characteristics .....	57
Table 4.1. Expatriation Motives .....	77
Table 4.2. Repatriation Motives .....	84
Table 4.3. Remuneration Expectations .....	102
Table 4.4. Work Culture Readjustment.....	103
Table 4.5. Expected Cultural Readjustment.....	110
Table 4.6. Negatives or Greatest Challenges .....	115
Table 5.1. Repatriates' Home Locations at Experiences-Phase Interview .....	120
Table 5.2. Repatriation Logistics .....	123
Table 5.3. Recognition of Skills and Experience .....	125
Table 5.4. Remuneration .....	133
Table 5.5. Work Culture Readjustment.....	134
Table 5.6. Work-Life Balance.....	137
Table 5.7. Perceptions of New Zealand Lifestyle .....	140
Table 5.8. Cost of Living .....	142
Table 5.9. Cultural Readjustment Experiences .....	146
Table 5.10. Social Reintegration .....	151
Table 6.1. Elements in which Expectations and Experiences were Generally Congruent .....	171
Table 6.2. Elements in which Expectations and Experiences were Not Congruent .....	174
Table 7.1. A Spectrum of Global Mobility Including SIRs .....	195