

Emic and etic perspectives in transnational migration research: methodological reflections of a cross-national research team

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Abstract

Purpose – This article presents fieldwork perspectives and research reflexivity gained from the cross-national research team, with the aim of promoting better qualitative research practices in transnational research. It focuses on how the team incorporates diverse cultural perspectives and insider and outsider roles to enhance the research in the data collection process.

Design/methodology/approach – This article is drawn from the authors' qualitative research with 25 Japanese retirees in Thailand, addressing cultural challenges encountered by researchers in the cross-national team when conducting field research.

Findings – Our findings indicate that researchers with an emic view in the cross-national team who shared nationality and cultural background as the participants facilitated an effective recruitment process and productive collaboration in data gathering. They also served as cultural brokers, tailoring smooth communication during interviews on certain cultures, participant traits and sensitive issues. On the other hand, the outsiders helped the team uncover more transnational issues that the insiders had overlooked. Additionally, combining emic and etic perspectives helps to avoid ethnocentric narratives or purely etic and emic conclusions.

Originality/value – This article addresses a gap in the methodological reflections in transnational research that remains largely overlooked. Our reflection highlights the advantages of cross-national teams, which include researchers from emigration and immigration countries. Their status and roles as insiders and outsiders significantly facilitate a positive impact on the research process and increase the extent of investigating the complex cultural dynamics of transnational practices. The incorporation of emic and etic perspectives is suggested in the methodological approach for transnational migration research.

Keywords Research teams, Cross-national, Cultural differences, Emic, Etic, Methodological reflection, Transnational research

Paper type Research paper

Introduction

An advancement in transportation and communication technologies has greatly accelerated cross-border flows of people (Urry, 2007), leading to a significant increase in international



migration. This phenomenon has become one of the mega-trends of demographic change in recent decades. In addition, transnational migration has become increasingly complex as a multiple form of mobility enables migrants to engage in continuous cross-border practices that generate specific social fields extending between the sending and receiving countries (Levitt and Schiller, 2004), which requires an analysis of the formation of new social contexts occurring simultaneously within two or more nation-state frameworks (Faist, 2000). Not only theorization on different scales and levels of abstraction but also methodological concerns are raised to better understand and analyze the recent changes in human mobility (Vertovec, 1999; Faist, 2012).

The number of people living outside of their country of origin was estimated to have reached 281 million in 2020. Between 2010 and 2020, the number of international migrants increased by 60 million globally, including even older people who are often perceived as being inactive in mobility. International retirement migration (IRM) also presents an increasing trend, with a 12.2% share recorded at midyear 2020 (United Nations, 2020). Recently, the so-called “lifestyle migration,” a flow of retired people searching for a better way of life with favorable amenities, sunny climates or cheaper retirement destinations outside their home countries (Benson and O'Reilly, 2009), has received more attention in migration research. This new trend was initially observed in Southern Europe and has lately expanded to the Global South – particularly the Caribbean and Southeast Asia (Williams *et al.*, 1997; King *et al.*, 1998; Toyota and Xiang, 2012).

Numerous studies have been undertaken on lifestyle migration, for example, in Southern Europe, British retirees in Spain (Hall, 2023), Northern European retired residents in eight regions of southern Europe and the Canary Islands (Casado-Díaz *et al.*, 2004), and many in other regions, including Southeast Asia (Horn *et al.*, 2015; Howard, 2008; Husa *et al.*, 2014; Ono, 2008; Toyota and Xiang, 2012). However, methodological reflections in transnational research remain largely overlooked, and researchers were mainly from the countries of emigration. International research teams knowledgeable about the cultures and related aspects under investigation are considered to increase the extent of research reflexivity and provide a possibility to observe complex cultural dynamics and their effects on cross-border social practices (Amelina, 2010). As observed by Taylor *et al.* (2011), cross-national teams offer advantages in terms of bringing a diversity of perspective, and such teams can play an important role in combining emic and etic perspectives (Malhotra *et al.*, 1996).

Therefore, this article presents fieldwork perspectives gained from a cross-national research team conducting qualitative research among Japanese retirees in Chiang Mai, Thailand with the aim of promoting better qualitative research practices in transnational research, particularly on IRM.

Context of the study

This paper presents our experiences conducting semistructured interviews with 25 Japanese retirees aged over 65 who have lived in Thailand on a retirement visa for at least three years. The research contextualized their responses to declining health and increasing care needs in their transition to deep old age while living far from a family and the welfare state support of their home country. The research was carried out in a highly favored retirement city for Japanese retirees from 2022 to 2023, applying a qualitative descriptive research design (Sandelowski, 2000).

Our cross-national research team

According to Faist (2012, p. 55), when analyzing the transnational life of immigrants, it is necessary to consider the cross-border ties and practices of persons. As our research focused

on retirement migrants, the interconnection between Japan and Thailand was undeniable. We, therefore, moved beyond methodological nationalism in designing transnational units of analysis (Wimmer and Schiller, 2003) and the extensive social ties, networks and other issues related to health that Japanese older persons have developed in their place of origin before moving to retire in Thailand, were taken into account accordingly. In addition, cultural perspective was included in our methodological work. This optic argues that cultural factors exert a significant influence in shaping transnational migration and help to analyze the development of new cultural patterns that arise from diverse cultural contexts under global conditions (Amelina, 2010).

The cross-national team, with transnational perspectives, was formed to incorporate the emic and etic perspectives into our methodological framework. The method of data collection, which has typically entailed the “native” researcher and/or research team to conduct studies in specific national contexts, has been progressively criticized (Room, 1986; Yao, 2021). This is because engaging in such practice carries the risks of generating research findings that are exclusively ethnocentric in nature. A research team, which is composed of researchers from different nationalities collecting data inside their respective national and cultural contexts, gain greater credibility, and this is seen as a more effective approach to cross-national research (Redmond, 2003).

Our team consists of four female members, comprising two researchers from a country of emigration (Japan) and two researchers from an immigration country (Thailand). Members of the team possess diverse backgrounds and areas of expertise in cultural studies, demography and gerontology, all of which enable us to offer a thoughtful scientific contribution (Nason and Pillutla, 1998). Despite spending a few years in Japan for their educational attainment and research, the Thai researchers had limited comprehension of Japanese culture, and one could not communicate in the language. Likewise, the Japanese researchers had little experience with Thailand from their short period of research visit, and one of them had only recently moved to join an affiliate with a Thai university. Neither of them could communicate in Thai, so English served as our lingua franca for communication in the team.

As a cross-national team, the Thai and Japanese researchers provided insider and outsider perspectives in different contexts. That is, the Thai researchers offered an insider’s perspective on the cultural milieu in which Japanese retired migrants currently reside (Thailand), whereas the Japanese researchers provided an outsider’s perspective. On the other hand, the insider view of Japanese researchers helped to understand the social practices of the Japanese retirees related to their cultural background and cultural transformation.

Findings

The findings focus on our reflections as a cross-national research team on the cultural challenges experienced in collecting qualitative data from Japanese retirees living in Thailand through perspectives based on our positionality as “insiders and outsiders” in transnational social spaces.

“Know” and “trust” in recruiting participants

There is a dearth of studies on IRM in Southeast Asia, particularly with regard to lifestyle migration, undertaken by researchers originating from the host countries. Because this phenomenon is relatively new to local researchers, or if it poses challenges in reaching participants, it still needs to be clarified. However, the latter is our issue; recruiting Japanese participants was challenging.

The status of Japanese retirees as long-term tourists granted them the flexibility to extend their stay in Thailand for durations varying from three months to several years;

however, there was no available official information that facilitated us to identify our target group who have lived for quite a long time and aged in Thailand. Although they are commonly found in well-known tourist locations, it required some effort for us to approach them. Entering Thailand as a long-stay tourist and establishing a fulfilling social environment in which to spend one's retirement years brings an inherent need for a high level of privacy. Additionally, businesses catering to long-term visitors-like shops, hotels and apartments – are typically reluctant to allow a researcher to bother their customers. Thus, while we searched for our participants, we needed an initial data source, nominating other potential data sources.

We found that the Japanese association was the primary resource to help us get in touch with potential Japanese participants. Despite the fact that the area under the study was in Thailand, we also found that all available channels to contact the Japanese Association required the Japanese language, including the association website (all in Japanese) and personal contact via phone or email. Although one of our Thai researchers was fluent in Japanese, we were apprehensive about requesting the cooperation of Japanese retirees, not simply because of the language barrier but also because the issued “know” and “trust” which were considerably crucial for accessing and dealing with the seed node (Eide and Allen, 2005, p. 45). At this stage, the Japanese researchers were in charge of contacting the association. Not only did they share the same nationality as the target group, but they also demonstrated an awareness of Japanese culture when seeking partnership in the initial stage, especially the cultural conventions about written communication. They also took into consideration the background and characteristics of the contact persons, such as age, gender and occupation before retirement, in order to ensure that their communication aligned with the typical Japanese preferences. The same cultural background and language of the association's members fostered a sense of ease and encouraged them to question the details of the project and its effects freely. These instilled a sense of safety among the association's members and were the first step in building their trust, enabling us to start the seed node. Upon the association-initiated referrals, we expanded our reach to include other retired participants. We finally obtained 25 cases due to the smooth start and the establishment of trust within the Japanese retirement community.

Making an appointment and meeting up for the interview

As Thai researchers, we are accustomed to making appointments with Thai respondents according to Thai customs. That is, if an appointment is not scheduled with a government organization or its personnel, there is generally no need to adhere to a formal or official manner of communication. Appointments can be scheduled either via telephone or through a straightforward notification process. On the other hand, when making an appointment with an older Japanese person, it is customary to arrange appointments using written communication, such as email or letters. So, although we had already communicated with them and duly provided them with an overview of the project and an appointment scheduling via telephone, we also had to send an email accordingly.

It is imperative to recognize and acknowledge the presence of cultural differences when engaging in an interview (Amelina, 2010). The cultural exchange between the Thai and Japanese researchers facilitated the team's ability to effectively strategize the scheduling of appointments and obtain the participants' informed consent and cooperation for the interviews. The Thai researchers discovered that while interacting with older Japanese individuals, it is essential to communicate in explicit, accurate and formal manner, as this is regarded as a sign of respect for older Japanese. Although Thai society also places great importance on respecting older people – generally characterized by humble and courteous communication, fostering a sense of amicability is also considered a component. Due to this

cultural difference, Thai researchers considered that demonstrating reverence towards Japanese retirees necessitate engaging in formal interactions.

Additionally, several cultural norms in meetings with Japanese participants were taken into account. We managed to arrive at the designated location prior to the commencement of the interview and were sure to have business cards readily available. Despite residing in Thailand, where the local population generally exhibits a relaxed attitude towards punctuality, Japanese retirees continue to adhere to strict timekeeping practices and consider late as socially unacceptable. It is an event that “time” was found to be a cultural issue in much cross-cultural research. There are different perceptions of time in different cultural contexts, such as “Fiji time”, identified in Laverack and Brown’s study (2003) and the research conducted with Latina women in some areas of New York City and northern New Jersey by Madriz (1998). Researchers working in a cross-cultural setting must be flexible and accommodate the cultural norms of the cohort group being researched.

In the Japanese context, business cards hold significance beyond their practical function as a means to share contact information. They are also seen as a ceremonial tool that conveys respect to the recipient. The Thai researchers were unaware of the fact that the act of exchanging business cards is considered a component of social etiquette. It is commonly assumed that this practice takes place during business meetings or on official occasions, and retirees are thought to be exempt from the practice of exchanging business cards. On the contrary, the Thai researchers discovered that even after a prolonged period of retirement, Japanese retirees continue to have and use business cards. Therefore, business cards were first exchanged between the researchers and the Japanese participants before each interview began.

Although this was a minor issue, we were concerned that it could create cultural gaps between us and the participants and lead to poor rapport and a covert attitude in the interviews. In addition to linguistic proficiency, we found that a mutual appreciation of cultural nuances serves to foster a positive ambience and establish a solid foundation for an interview (Zhang and Guttormsen, 2016, p. 7).

Conducting the field interview

Each field interview was conducted by two or three researchers, mainly with the project leader (who could not communicate in Japanese) and either the Japanese-speaking Thai researcher or the Japanese researchers. In an effort to incorporate diverse perspectives, we deliberately included both Thai and Japanese researchers in conducting the interviews. However, on a few occasions, practical limitations, such as geographical distance, presented barriers to involving the Japanese researchers, leading to interviews being steered by Thai researchers alone. All interviews were conducted in Japanese, and during the interview, translation was provided for the Thai researcher who could not communicate in Japanese.

Undertaking cross-cultural and transnational research involves numerous degrees of cultural sensitivity to be carefully considered (Liamputtong, 2010, pp. 86–108; Amelina, 2010), particularly during interviews or data collection. We found this to be the case in different cultural encounters between the researchers and the participants, as well as with regard to our positionality, which shifted between insider and outsider during our fieldwork.

Placing issues of different gender and age

The way in which we were “placed” by Japanese participants, and vice versa, was a concern for us when asking probing questions and delving deeply into participants’ experiences, perspectives and opinions (Al-Makhamreh and Lewando-Hundt, 2008; Ramji, 2008). The

“placing” issues of gender and age were crucial in our study. The majority of our participants were male, which was accordant with the overall characteristics of retired migrants living in Thailand in previous surveys and official records (Howard, 2008; Tangchitnusun, 2016; Miyashita *et al.*, 2017). They ranged in age from the late 70s to the early 80s, while all of the researchers were middle-aged females. Our interview covered several topics that were somewhat sensitive to age and gender differences. We had to negotiate our gender, age and language throughout the period we were conducting the interviews.

One of our experiences consisted of digging into the participants’ backgrounds concerning their married life and family in order to investigate their social ties across borders and their transnational practices when they needed some support or care. Some of our participants had been single until reaching the age of retirement and got married after moving to Thailand. Others remained unmarried. In the context of the male-dominated culture in Japan, it is well acknowledged that inquiring about the topic of “marriage” to an unmarried individual of advanced age is considered a sensitive issue. Moreover, this matter is likely to be intertwined with very personal circumstances. One may envision the potential presence of adverse conditions in the backdrop, considering the prevailing state of being unmarried. Additionally, it serves as an indication of a failure to conform to societal expectations regarding gender roles. Asking such questions is regarded as demonstrating a lack of consideration for the person’s privacy and may cause discomfort. People who ask such questions are likely to be perceived as rude or uneducated.

However, this sensitive issue needs to be explored. It was the advantage of our cross-national team, comprised of members who shared social and cultural backgrounds with the participants. The Japanese researchers also served as “cultural brokers” to link the Thai researchers and the participants and facilitate a smooth conversation. For instance, we interviewed one unmarried retiree aged 74 years who had lived in Thailand for 14 years and intended to stay in Thailand as long as he remained physically independent. He mentioned a ‘sense of stagnation’ and ‘social pressure’ in Japan as his motivation for migration, and we needed to explore his stress-field background more. A Thai researcher raised the question, “Was there any pressure from your family or society to do with your being unmarried?” The Japanese researcher acted as a “cultural broker” to reduce the sensitivity of questions by sharing personal experiences of similar pressure and using both spoken and nonverbal language that was culturally appropriate for communicating with the participant, who was her opposite in terms of gender and seniority. This initiative might be interpreted as an attempt to provide a “place” for the participant where sensitive topics could be shared safely. This is connected to the building of a trusting relationship, thereby encouraging interviewees to actively participate and willingly disclose their experiences.

In addition, the subjects of “health problems” and “physical deterioration” are considered delicate and personal matters for older people in Japan. The societal expectations surrounding dependence on others are often regarded as devaluation and indignity, particularly within the context of masculinity. Diminishing health status is consequently associated with a proclivity towards reliance on care and additional forms of assistance. During our interview on the participants’ health issues, supplementary questions were improvised and generated based on their health problems and any physical deterioration associated with their ageing. Example responses included “Lately, I’ve been feeling tired quite easily” or “I’m just taking blood pressure medication.” The Japanese researchers took the role of not only a ‘researcher’ but also a ‘(cultural) translator’ since the cross-national team conducted the interviews only in Japanese. The Thai researchers felt confident that the questions they posed would not cause unease or embarrassment to the participants or affect the atmosphere of the conversation because, as cultural brokers, the Japanese researchers helped to refine the questions and steered the conversation. They knew how to appropriately

word, order, and pose questions, how much personal information to divulge and when to leave sensitive topics.

Shifting positionality between insider and outsider

According to [Chawla \(2007, p. 2\)](#), the concept of an “authentic” insider is subject to debate. The distinction between an insider (native researcher) and an outsider (non-native researcher) may not be viewed as a rigid dichotomy. Instead, the positionality of researchers might dynamically shift between these roles contingent upon the particular conditions ([Narayan, 2008](#)). This notion is endorsed by our transnational research, wherein we observed a dynamic interchange of status and roles between insiders and outsiders. This fluidity arose as a result of the ongoing transnational practices of participants, which created a constant link between Thailand and Japan.

The issues of healthcare utilization and health-seeking behaviors were also key focuses of our research to gain insights into the strategies employed by participants in managing chronic illnesses, such as adhering to drug regimens and attending regular medical appointments. Additionally, we sought to explore how individuals prepare for the eventuality of more severe health issues and plan for long-term care as they age and require assistance.

From our self-reflection, the Thai researchers found themselves as outsiders when discussing the health care and welfare system for older people in Japan and the culture of family care for older persons. Examples of responses to our questions about this include: “I don’t have medical insurance that covers health expenses in Thailand, but I can use the Japanese government’s medical care and long-term care insurance”, “Every six months, I return to Japan to see my doctor, get a full health checkup, and stock up on all the medication I need for the next six months in Thailand”, and “It is common for old persons to live alone, we are happy to be independent without relying on our children.” The culture of family care was also an issue that the Thai researchers share since they have a profound belief in the value of filial piety, by which children must provide care for their parents as an expression of gratitude. In addition, although the Thai researchers knew to a certain degree about the healthcare and welfare system in Japan, the conversations conducted by the Japanese researchers, which were ingrained in the Japanese social system, were smoother and more in-depth than those conducted by the Thai researchers alone. Conversely, as outsiders, the Thai researchers compared the Japanese and Thai cultures and the welfare of caring for older persons, which brought up questions and observations that the Japanese researchers had either overlooked or were accustomed to, which allowed the team to delve deeper into the topics and uncover more transnational issues.

On the other hand, the Thai researchers shifted their position to that of an insider when participants sought healthcare services in Thailand. In contrast, the Japanese researchers exhibited limited familiarity with residing in Thailand and possessed a deficiency of understanding regarding Thai culture and the societal norms prevalent in Thailand. At this stage, the participants perceived them as outsiders due to the fact that the majority of participants had been in Thailand as long-term residents for duration of ten years or more, thus acquiring a certain level of familiarity with the Thai setting. In such conversations, the Japanese researchers occasionally had challenges in comprehending the subject matter when the participants referred to hospitals, care homes, or common healthcare practices specific to the Thai setting. In this particular context, the Thai researchers engaged in knowledge exchange with their Japanese members. During the interview, they assumed a proactive role to incorporate relevant inquiries and purposefully steer the participants’ narrative towards a more profound exploration.

Balancing ethnocentrism

Our field interview experience also highlighted how incorporating emic and etic viewpoints helps mitigate ethnocentric research findings and contribute to transnational perspectives in

methodology. We observed how that instance of “ethnocentrism,” - an attitude to view others based on one own norms, values and beliefs, often placed as superior to other cultures (Alejandro, 2017)- could arise during the interview when both the researcher and the participant shared the same ethnicity, social and cultural resemblance.

As an illustration, one participant shared information regarding his health problems and mentioned the reappearance of *Helicobacter pylori* (*H. pylori*) in his gastric tract. He experienced this illness once after relocating to Thailand, and he returned to Japan for treatment. He believed that the uncleanness and contaminated tap water in Thailand was the cause of the repeat infection. The availability of tap water in Thailand is often a topic of discussion among Japanese communities; for example, is it safe to use tap water for washing food, cooking, washing dishes, brushing teeth, gargling, showering and so on? The undrinkable tap water is assumed to be highly contaminated. The Japanese researcher supported this by stating that thriving businesses facilitate Japanese residents in Thailand, offering them access to clean water for various daily activities, such as bathing and showering, albeit at a considerable expense.

This narrative was understandable and rather sympathetic to a Japanese researcher. The conversation based on the same attitude continued to expand among the participant and the Japanese researcher as they held the perception that tap water in Japan is clean, with trustworthy and secure production standards. As the insider in the Thai context, the Thai researcher redirected the course of the discourse towards a different angle by providing an understanding that was unfamiliar to the Japanese researcher. It is a common understanding for Thai people that tap water in Thailand is not drinkable, in contrast to Japan, but it is safe for other domestic uses as Thailand also has a water treatment system. As a researcher, ethnocentrism may lead us to overlook some social truth and authentically understand the issues under study. When the team reached the intersection of perspective differences, careful negotiations around language, epistemologies and cultures were needed for positive outcomes (McAlpine *et al.*, 2021).

Our experience reflects that on topics that are likely to conclude in “ethnocentric narratives”, the inclusion of researchers with different cultural backgrounds and different positionality of insider and outsider can deter leading “ethnocentric narratives” and, as a result, it helped in distancing itself from the production of ethnocentric research findings. In other words, the state of being embedded in a specific context implies that an insider possesses pre-existing biases and conclusions, whereas an outsider external to that context may exhibit a greater degree of objectivity and freedom from personal bias, which results in fewer errors in their conclusions and narratives (Brannick and Coghlan, 2007). In this sense, our teamwork experience led us to become more aware of our own cultural and personal biases that enhanced our way of subsequent interviews, analyzing and interpreting the data.

Conclusion

Transnational research primarily involves cultural dynamic issues across international borders, and the reorganization of research work into cross-cultural and interdisciplinary-organized scientific teams has been suggested in methodological concerns to raise a better understanding and analyze the complex changes in recent human mobility. However, methodological reflections on cultural challenges in transnational research remain lacking attention. This study thus filled this gap by reflecting on the fieldwork experiences of the cross-national team in dealing with cultural challenges in conducting the transnational lifestyle of Japanese retirees residing in Thailand.

Our findings shed additional light on the advantage of cross-national teams consisting of researchers from both emigration and immigration countries in enhancing research reflexivity and allowing for the observation of intricate cultural dynamics in cross-border

social practices. Our findings demonstrated that having a team member with the same nationality and cultural background as the target group facilitates building trust and developing rapport rapidly, leading to an effective recruitment process and productive collaboration in collecting data. In addition, the emic insight of the researchers from the same emigration country as participants can also act as cultural brokers, serving as intermediaries between researchers in a host country and participants, facilitating seamless communication in a sensitive and responsive manner when conducting interviews on the specific culture, customs or delicate issues in such society.

Furthermore, the composition of a cross-national team offers a dynamic interchange of perspectives between emic and etic views when collecting the data related to transnational formations and practices between the original and destination country of participants. The research members with different positionalities and perspectives can question the research based on their different experiences and backgrounds and help the team benefit from the insiders' strengths and find a way out of the outsiders' weaknesses and vice versa. Our results also provided evidence that incorporating emic and etic perspectives helps to avoid ethnocentrically skewed narratives and contributes to transnational perspectives in methodology.

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