

**DISPOSITIONAL FACTORS, COPING AND STRESS AS
PREDICTORS OF EXPATRIATES' ADJUSTMENT,
PERFORMANCE AND DESIRE TO TERMINATE THE
ASSIGNMENT**

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FOR THE READER'S ATTENTION

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- The references as well as the editorial style as prescribed by the *Publication Manual (4th edition)* of the American Psychological Association (APA) were followed in this dissertation. This practice is in line with the policy of the Programme in Industrial Psychology of the North-West University to use the APA style in all scientific documents as from January 1999.
- The thesis is submitted in the form of research articles. The editorial style specified by the *South African Journal of Industrial Psychology* (which agrees largely with the APA style) is used, but the APA guidelines were followed in constructing tables.

PREFACE

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TABLE OF CONTENTS

	Page
Preface	
List of figures	
List of tables	
Abstract	
Opsomming	
 CHAPTER 1: INTRODUCTION	
1.1 Problem statement	1
1.2 Research objectives	7
1.2.1 General objective	7
1.2.2 Specific objectives	7
1.3 Research method	8
1.3.1 Research design	8
1.3.2 Participants	9
1.3.3 Measuring instruments	9
1.3.4 Statistical analysis	12
1.4 Chapter division	14
1.5 Chapter summary	14
References	15
 CHAPTER 2: RESEARCH ARTICLE 1	
<i>Coping strategies, locus of control and expatriates' desire to terminate the assignment</i>	
Abstract	21
Method	29
Results	32
Discussion	37
Recommendations	40
References	41

CHAPTER 3: RESEARCH ARTICLE 2

Dispositional factors, locus of control, expatriates' cross-cultural adjustment and their desire to terminate the assignment

Abstract	49
Method	58
Results	60
Discussion	68
Recommendations	71
References	73

CHAPTER 4: RESEARCH ARTICLE 3

Predictors of expatriates' success

Abstract	80
Method	89
Results	94
Discussion	102
Recommendations	107
References	108

CHAPTER 5: CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS

5.1	Conclusions	113
5.2	Limitations	117
5.3	Recommendations	119
5.3.1	Recommendations for the organisations	119
5.3.2	Recommendations for future research	121
	References	123

LIST OF TABLES

Table	Description	Page
CHAPTER 2: RESEARCH ARTICLE 1		
1	Characteristics of the Expatriates	30
2	Descriptive Statistics and Alpha Coefficients of the Measuring Instruments	34
3	Correlation Coefficients between the Variables	35
4	Regression Analysis with Avoidance as Dependent Variable	36
5	Regression Analysis with Approach Coping as Dependent Variable	37
CHAPTER 3: RESEARCH ARTICLE 2		
1	Factor Loadings for Principal Component Extraction and Oblique Rotation on Locus of Control Items	62
2	Descriptive Statistics and Alpha Coefficients of the Scales	63
3	Descriptive Statistics and Alpha Coefficients of the NEO-PI-R	64
4	T-Test Results	65
5	Product-moment Correlation Coefficients between the Measuring Instruments	66
6	Regression Analysis with Cross-cultural Adjustment as Dependent Variable	67
7	Regression Analysis with Termination of the Assignment as Dependent Variable	68
CHAPTER 4: RESEARCH ARTICLE 3		
1	Factor Loadings, Percentage Variance and Covariance for Principal Factors Extraction and Oblique Rotation on Stress Items	94
2	Severity of Stressors	95
3	Descriptive Statistics for the Measuring Instruments	96
4	Correlations between the Measuring Instruments	97
5	T-Test Results	99
6	Regression Analysis with Cross Cultural Adjustment as Dependent Variable	100
7	Regression Analysis with Termination of the Assignment as Dependent Variable	101
8	Regression Analysis with Performance as Dependent Variable	102
	References	108

LIST OF FIGURES

Figure	Description	Page
	CHAPTER 4: RESEARCH ARTICLE 3	
1	Model of the expatriate's adjustment	84

ABSTRACT

Subject: Dispositional factors, coping and stress as predictors of expatriates' performance, their desire to terminate the assignment and their cross-cultural adjustment.

Key terms: Personality, extraversion, neuroticism, agreeableness, conscientiousness, openness, locus of control, coping, stress, motivation, expatriates.

The increase in globalisation has led many organisations world-wide and in South African to send more employees on international assignments than ever before, with every indication that the use of expatriates will continue to expand into the 21st century. Expatriate assignments are important to the success of multinational companies because they can help build the level of global competence within the organisation, and expatriates often fill critical positions in host countries (e.g. new market development, technology transfer, joint venture negotiations and subsidiary management).

Given the strategic importance multinational companies attach to global assignments, the harm an unsuccessful expatriate may cause in the host country can be detrimental to the multinational company's future global business. Implications of poor expatriate cross-cultural adjustment include inadequate performance, psychological stress, premature termination of the assignment, negative effects on the expatriates' families and the long-term career repercussions upon repatriation after failed expatriate assignments. Thus, in order to remain competitive in today's global marketplace, multinational companies have recognised that the attraction, selection, development and retention of employees who can live and work effectively outside their own national borders are crucial to their success. This study proposed that personality dispositions, coping, stress and expatriates' motivation for accepting the assignment can predict three criteria of expatriate success, namely (a) the desire to terminate the assignment, (b) performance, and (c) the cross-cultural adjustment of expatriates.

The study population consisted of 95 expatriates from eight multi-national organisations. The research method for each of the three articles consists of a brief literature review and an empirical study. A cross-sectional survey design was used to achieve the research objectives. Descriptive statistics (e.g. means, standard deviations, skewness and kurtosis) were used to

analyse the data. Cronbach alpha coefficients and exploratory factor analysis were used to assess the reliability and validity of the measuring instruments, and multiple regression analyses was conducted to determine the percentage of the variance in the dependent variables that is predicted by the independent variables. The Neo-Personality Inventory Revised, Work Locus of Control Scale, Expatriate Stress Inventory, a biographical questionnaire, which included expatriates' motivation for accepting the assignment (independent variables) and expatriates' cross-cultural adjustment, their desire to terminate the assignment and their performance (dependent variables) were administered.

The results showed that external locus of control is related to avoidance. Avoidance coping of expatriates' was best predicted by an external locus of control and approach coping of expatriates' was best predicted by an internal locus of control.

The results showed that expatriates' desire to terminate the assignment is related to their cross-cultural adjustment and that personality dimensions are related to their cross-cultural adjustment and their desire to terminate the assignment. Personality dimensions explained 12% of the variance in expatriates' cross-cultural adjustment. Assertiveness and cross-cultural adjustment explained 17% of expatriates' desire to terminate the assignment.

The results showed that cultural stress explained 17% of the variance in expatriates' cross-cultural adjustment. Assertiveness and cross-cultural adjustment explained 28% of expatriates' desire to terminate the assignment and extrinsic motivation explained 20% of expatriates' performance.

Recommendations are made regarding future research and practical implications for expatriate management.

OPSOMMING

Onderwerp: Disposisionele faktore, coping en stres as voorspellers van geëkspatrieerdes se prestasie, hul begeerte om die opdrag te beëindig en hul kruiskulturele aanpassing.

Sleutelterme: Persoonlikheidsdisposisies, ekstroversie, neurotisme, instemmendheid konsensieusheid, openheid, lokus van beheer, stres, motivering, geëkspatrieerdes.

Globalisering het daartoe gelei dat baie internasionale organisasies asook organisasies in Suid-Afrika al hoe meer werknemers op internasionale opdragte stuur, en alle aanduidings is dat die gebruik van geëkspatrieerdes sal toeneem na gelang die 21ste eeu vorder. Geëkspatrieerde-opdragte is belangrik vir die sukses van multinasionale maatskappye aangesien dit bydra tot die ontwikkeling van maatskappye se bevoegdheidsvlakke in die globale konteks en geëkspatrieerdes vul dikwels sleutelposisies in gasheerlande (bv. in ontwikkeling van nuwe markte, oordrag van tegnologie, onderhandelings oor gesamentlike ondernemings en bestuur van filiale).

Gegewe die strategiese belangrikheid wat multinasionale maatskappye aan internasionale opdragte heg, kan die skade wat mislukte geëkspatrieerdes aanrig nadelig wees vir die multinasionale maatskappy se toekomstige internasionale besigheid. Implikasies van swak kruiskulturele aanpassings van geëkspatrieerdes sluit in onvoldoende prestasie, psigologiese stres, die vroeë beëindiging van die internasionale opdrag, negatiewe effek op die families van geëkspatrieerdes asook die langtermyn-effek van 'n mislukte opdrag op die loopbaan van geëkspatrieerdes na repatriasie. Gevolglik het multinasionale maatskappye besef dat, ten einde mededingend in die hedendaagse wêreldwye mark te wees, dit deurslaggewend vir hul sukses is om werknemers te werf, te keur en te behou wat effektief buite hul eie nasionale grense kan woon en werk. Hierdie navorsing het van die veronderstelling uitgegaan dat persoonlikheidsdisposisies, coping, stres en geëkspatrieerdes se motivering vir die aanvaarding van die opdrag drie kriteria van geëkspatrieerdes se sukses kan voorspel, naamlik (a) die begeerte om die internasionale opdrag te beëindig, (b) geëkspatrieerdes se prestasie en (c) die kruiskulturele aanpassing van geëkspatrieerdes.

Die studiepopulasie het bestaan uit 95 geëkspatrieerdes vanuit agt multinasionale organisasies. Die navorsingsmetode vir elk van die drie artikels bestaan uit 'n bondige literatuuroorsig en 'n empiriese studie. Beskrywende statistiek (bv. gemiddeldes, standaardafwykings, skeefheid en kurtose) is gebruik om die data te ontleed. Cronbach-alfakoëffisiënte en eksploratiewe faktoranalise is gebruik om die betroubaarheid en geldigheid van die meetinstrumente te bepaal, en meervoudige regressie-analise is uitgevoer om die persentasie variansie in die afhanklike veranderlikes te bepaal wat deur die onafhanklike veranderlikes voorspel word. Die volgende is as meetinstrumente gebruik: Neo-Personality Inventory Revised, Expatriate Stress Inventory, 'n biografiese vraelys, wat geëkspatrieerdes se motivering om die opdrag te aanvaar insluit (onafhanklike veranderlikes), die kruiskulturele aanpassing van geëkspatrieerdes, hul begeerte om die internasionale opdrag te beëindig en hul prestasie (afhanklike veranderlikes) is as meetinstrumente gebruik.

Die resultate het getoon dat 'n eksterne lokus van beheer met vermyding verband hou. Eksterne lokus van beheer was die beste voorspeller van geëkspatrieerdes se gebruik van vermyding as coping-strategie. Interne lokus van beheer was die beste voorspeller van geëkspatrieerdes se gebruik van aktiewe coping-strategieë.

Die resultate het getoon geëkspatrieerdes se begeerte om die internasionale opdrag te beëindig met hul kruiskulturele aanpassing verband hou en dat persoonlikheidsdimensies verband hou met geëkspatrieerdes se kruiskulturele aanpassing en hul wens om die internasionale opdrag te beëindig. Persoonlikheidsdimensies het 12% van die variansie in die kruiskulturele aanpassing van geëkspatrieerdes verduidelik. Selfgelding en kruiskulturele aanpassing het 17% van die variansie in geëkspatrieerdes se begeerte om die internasionale opdrag te beëindig, verduidelik.

Die resultate het getoon dat kultuurstres 17% van die variansie in die kruis-kulturele aanpassing van geëkspatrieerdes verduidelik. Selfgelding en kruiskulturele aanpassing het 28% van die variansie in geëkspatrieerdes se wens om die internasionale opdrag te beëindig, verduidelik en ekstrinsieke motivering het 20% van die variansie in geëkspatrieerdes se prestasie verklaar.

Aanbevelings oor toekomstige navorsing en praktiese implikasies vir die bestuur van geëkspatrieerdes word aan die hand gedoen.

CHAPTER 1

INTRODUCTION

This thesis deals with dispositional factors, coping and stress as predictors of expatriates' adjustment, performance and their desire to terminate the assignment.

In Chapter 1 the motivation for the research is discussed in terms of the problem statement and aims of the research. Thereafter the research method and division of chapters are discussed.

1.1 PROBLEM STATEMENT

In order to remain competitive in today's global marketplace, multinational companies have recognised that global human resource management is critical to their success. The tendency for organisations to drift from domestic to global, regardless of how small the organisation (Furnham, 1997) is a world-wide trend which has also affected companies in South Africa. In fact, one of the direct consequences of South Africa's becoming part of the global business community is that there has been a vast increase in the number of South Africans taking up assignments outside the country (Hawley, 1995, 1999). More importantly, it is increasingly common for people from all backgrounds to work abroad for a period of time. Consequently, managers and technical specialists in multinational organisations move around the world continuously as their organisations become more deeply integrated into the global economy.

Expatriate assignments are important to the success of multinational companies because they can help build the level of global competence within the organisation (Stohl & Caligiuri, 1998; Tung & Miller, 1990). Given the strategic importance multinational companies place on global assignments (e.g. high-level negotiations, foreign subsidiary management and new market development), the harm an unsuccessful expatriate may cause in the host country may be costly and even detrimental to the future of a multinational company in a host country (Gregersen & Black, 1990; Zeira & Banai, 1985). As such, researchers and practitioners alike are interested in determining how to predict and facilitate the success of expatriates' global assignments (Porter & Tansky, 1999; Stanley & Ahern, 1998).

Success on a global assignment is greatly influenced by an expatriate's cross-cultural adjustment to the host country (Black & Mendenhall, 1990; Caligiuri, 1997; Kealey & Protheroe, 1996; Sappinen, 1993). For example, cross-cultural adjustment is positively related to performance on the assignment and negatively related to the premature termination of the assignment (Black, 1988; Caligiuri, 1997; Tung, 1981). For these reasons, research examining ways to predict and improve cross-cultural adjustment have received much attention in the recent past (e.g., Aycan, 1997; Aryee & Stone, 1996; Black & Gregersen, 1991; Black et al., 1991; Kealey, 1989; McEvoy & Parker, 1995; Morley et al., 1999; Robie & Ryan, 1996; Schneider & Asakawa, 1995).

Tung's (1981) article suggested that cross-cultural adjustment is important to the outcome of the assignment by examining the reasons for expatriates' premature termination. The article found that spouse's and expatriates' inability to adjust to living in the host country was the two most frequently cited reasons why assignments fail. Cross-culturally adjusted expatriates are psychologically comfortable with living abroad (Black, 1990; Black & Gregersen, 1991) and they represent a more integrative approach to a new culture. On the other hand, maladjusted expatriates are unable or unwilling to accept the host country's behaviours, norms and roles. They tend to cohere to anything that reminds them of their home country whenever possible. Maladjusted expatriates also tend to show signs of emotional stress such as depression and homesickness (Church, 1982).

A prerequisite for the synergetic delivery of outputs for expatriates and their families is their wellness. In addition, various studies (Black & Stephens, 1991; Brewster & Hegewisch, 1994; De Cieri et al., 1991; Forster, 1992; Guzzo et al., 1994; Tung, 1987) have identified the lack of spouse adjustment as a critical factor in expatriate assignment failure.

It has been proposed by many researchers (Arthur & Bennett, 1995; Black, 1990; Church, 1982; Mendenhall & Oddou, 1985; Ones & Viswesvaran, 1997) that personality characteristics predict, in part, whether individuals will succeed on their expatriate assignments. Although many personality characteristics exist, researchers have found that five factors, labelled "the Big Five", provide a useful typology for classifying them (Barrick & Mount, 1991; Digman, 1990; Goldberg, 1992, 1993; McCrae & Costa, 1987; McCrae & John, 1992; Mount, Witt & Barrick, 2000). The Big Five personality factors are extraversion, neuroticism, openness to experience, agreeableness and conscientiousness (Caligiuri, 2000;

Tokar, Fischer & Subich, 1998; Velting, 1999; Thoms, Moore & Scott, 1996). Judge et al. (1999) found that neuroticism negatively predicted career success while Dunn et al. (1995) found that emotional stability, conscientiousness and agreeableness related to counterproductivity and job performance (Barrick & Mount, 1993).

Results of a study done by Arthur and Bennet (1995) offered some preliminary evidence for the relationship between personality and expatriate success. This study, however, is limited in that it is based on expatriates' perceptions of what was needed for success, rather than true validity evidence. Although not in the expatriate context, validity evidence does exist for personality characteristics as predictors of job performance (Barrick & Mount, 1991; Hogan, Hogan & Roberts, 1996; Hough, Eaton, Dunnette, Kamp & McCloy, 1990; Ones, Mount, Barrick & Hunter, 1994; Tett, Jackson & Rothstein, 1991). Caligiuri (2000) supplied evidence for personality characteristics as predictors of expatriate's desire to terminate the assignment and supervisor-rated performance. Results from this study indicated extroversion, agreeableness and emotional stability as negatively related to expatriates desire to terminate their assignments and conscientiousness as positively related to supervisor-rated performance. Previous research (Van der Bank & Rothmann, 2003) supplied evidence of significant relationships between Extraversion, Openness to Experience, Agreeableness, and expatriates' performance as rated by supervisors.

Although the five factor personality dimensions are useful in studying expatriates job performance and desire to terminate the assignment, locus of control as psychological strengths (conceptualised from a fortigenic paradigm) (Strümpfer, 1995) could be included to add to the emotional stability dimension. It could be expected that psychological strengths, which are healthy, positive and pro-social, should be a buffer against the expatriates' failure on the international assignment, which is costly and detrimental to the company's future in the host country. Van der Bank and Rothmann (2003) found that an internal locus of control is related to motivation, commitment and effective relationships of expatriates (as rated by supervisors). Thus, expatriates with an internal locus of control (compared with those with an external locus of control) are likely to be seen as motivated and committed and will maintain effective relationships with others. Furthermore, the psychological strength of locus of control augments emotional stability (M. Barrick, personal communication, June 5, 2001).

Rotter (1966) developed locus of control as a personality variable which indicates the degree to which individuals perceive that they control or are controlled by their environment. Spector (1988) defined locus of control as the generalised expectancy that rewards, reinforcements or outcomes in life are controlled either by one's own actions (internal locus) or by other forces (external locus). According to Judge et al. (1998), individuals with an internal locus of control feel they can manage situations in the work context, because these situations are seen as being within their personal control, while individuals with an external locus of control are less inclined to cope with frustrations in organisations and may withdraw or react aggressively (Rahim & Psenicka, 1996; Spector, 1982).

According to Mayer and Sutton (1996), individuals with an internal locus of control are more successful in personal relationships than individuals with an external locus of control. In support, Spector (1982) is of the opinion that individuals with an external locus of control look at others for direction. Spector (1986) found that high levels of perceived control were associated with high levels of job satisfaction, commitment and involvement, and low levels of stress, absenteeism and turnover. Van der Bank and Rothmann (2003) found internal locus of control positively related to performance of expatriates (as rated by supervisors). Although it could be expected that an individual with an internal locus of control would perform on the job and be less inclined to terminate the assignment because of his or her perceived ability to control situations, the research results are inconsistent.

One of the basic issues in the expatriate's behaviour domain concerns coping, or ways in which an individual could attempt to deal with environmental and job stressors to ward off aversive strains (Beehr, Johnson & Nieva, 1995). Coping refers to perceptual, cognitive or behavioural responses that are used to manage, avoid or control situations that could be regarded as difficult (Folkman & Lazarus, 1984; Moos, 1994; Zeidner & Endler, 1996). Rowe (1997, 1999) demonstrated the importance of teaching individuals with limited coping skills to alter the way in which they currently address problems. In the expatriate context, coping was found to be a significant predictor of expatriates' performance and their desire to terminate the assignment (Van der Bank & Rothmann, 2003).

When formulating the proposed predictors of adjustment to the expatriates' assignment, a number of interrelationships among the variables can be proposed. It can be proposed that the characteristics of the situation and the person's subjective evaluation of the relevance of the

situation to his or her well-being (high levels of appraised stress are likely to exceed coping skills and resources available) and resources available should have indirect effects on adjustment, via their effects on coping (Alsoofi, 2000; Lazarus, 1990; Mlonzi & Strümpfer, 1998). According to Folkman and Lazarus' cognitive-phenomenological model of stress and coping (Lazarus, 1990), people's appraisals of a potentially stressful situation are shaped by both the characteristics of the situation and their coping resources.

Various models exist that can be used to conceptualise work stress. In the Person-Environment Fit theory (Frenz, Caplan & Harrison, 1992) stress in work settings is attributed to the interaction of an individual with his or her work environment. Karasek's (1979) Demand-Control model focuses on the interactions between the pressures of the work environment and the decision scope of the employee in fulfilling the requirements of a job. These two models give less attention to how specific job pressures interact with individual differences in personality and coping resources to influence the emotional reactions of employees. According to Spielberger and Vagg (1999), a comprehensive assessment of work stress requires an evaluation of the specific aspects of one's job which produce job strain. In the expatriate context, given that stress is often associated with living and working in ambiguous and unfamiliar environments, the pressures of the environment as well the job influence the emotional reactions of expatriates.

The following research questions arise on the basis of the description of the research problem:

- What are the relationships between locus of control and coping on the one hand and the desire to terminate the assignment of expatriates of multinational companies on the other hand?
- What is the internal consistency and construct validity of a coping questionnaire, a locus of control questionnaire and a scale measuring the desire to terminate the assignment?
- Can personality dispositions and locus of control predict the desire to terminate the assignment as well as the cross-cultural adaptation of expatriates of multinational companies?
- What are the relationships between personality dispositions, stress, expatriates' motivation and biographical data on the one hand and the desire to terminate the assignment,

performance and cross-cultural adjustment of expatriates of multinational companies on the other hand?

- Can stress be used to predict expatriates' cross-cultural adjustment to the international assignment?
- What is the internal consistency and construct validity of an expatriate stress inventory?

This research will contribute to Industrial Psychology as a science in the following ways:

- This study is the first in South Africa of which we are aware that investigates personality dispositions, coping, locus of control, stressors of expatriation, expatriates' motivation and biographical data on the one hand and expatriates' desire to terminate the assignment, performance and their cross-cultural adjustment on the other hand. Results from this study and the exploratory nature of the study will aid in the identification of predictors of expatriate success, as well as in the measurement and definition of expatriate success.
- This study contributes to the existing literature in offering a model to describe expatriate success as measured by expatriates' cross-cultural adjustment to an international assignment, their performance and their desire to terminate the assignment.
- Internationally, little research has been done on expatriates and the use of personality characteristics, psychological strengths, coping and stress as predictors of the success of expatriates. This research will provide insights into some of the predictors of expatriate success based on theoretical empirical research and will contribute to the existing literature in offering additional information on what constitutes "cross-cultural adjustment".
- Correlations between all variables can clarify the interaction of other variables with expatriation. This could point to important demographic variables, stress factors, coping factors, personality dispositions that have an influence on expatriates' desire to terminate the assignment, performance and their cross-cultural adjustment. Such correlations would highlight the most important variables that need to be addressed through selection, placement, induction, support, training and development programmes, as well as performance management systems
- A stress measure will be developed for expatriates. This instrument can also expand the theory of stress in expatriation by examining salient stressors, underlying factors, as well as frequency and intensity of stressors. In addition, studying the Big Five personality

dimensions in relation to the stress expatriates experience provides a broadly accepted basic framework for future research.

- Measures will be proposed for predicting expatriate success, specifically in terms of cross-cultural adjustment, performance and desire to terminate the assignment.
- A measure of coping will exist for the expatriate context. The coping strategies most frequently used might point to problems regarding coping, and may highlight needs in the development of employee assistance programmes.
- This study provides valid evidence of predictors of expatriate success in the corporate context. The sample of this study consists of expatriate employees in the corporate context. A large number of the past research on expatriation and cross-cultural adjustment has been conducted not with expatriate employees but with other populations of international sojourners, such as students or Peace Corps volunteers. The evidential dissimilarities in the foreign experience of different types of sojourners make generalisability of conclusions in the corporate context questionable.
- The area of expatriate management in South Africa is full of complexities and challenges for practitioners and researchers to investigate. The results of this study lend themselves well to future collaborative research between scientists and practitioners.

1.2 RESEARCH OBJECTIVES

The objectives of the research include both a general objective and specific objectives.

1.2.1 General objective

With reference to the above formulation of the problem, the general objective of this research is to establish the relationships between dispositional factors, coping, biographical factors and stress as predictors of expatriates' adjustment, performance and desire to terminate the assignment.

1.2.2 Specific objectives

The specific research objectives are as follows:

- To assess the relationships between locus of control, coping and the desire to terminate the assignment of expatriates of multinational companies.
- To validate a measure of coping, locus of control and the desire to terminate the assignment scale for expatriates.
- To study if personality dispositions and locus of control predict the desire to terminate the assignment as well as the cross-cultural adaptation of expatriates of multinational companies.
- To determine the relationships between personality dispositions, stress, expatriates' motivation and biographical data on the one hand and the desire to terminate the assignment, performance and cross-cultural adjustment of expatriates of multinational companies on the other hand.
- To develop a measure of expatriate stress in the South African context by focussing on typical work and environmental stressors that have been identified in previous research on expatriates.
- To investigate if stress can be used to predict expatriates' cross-cultural adjustment to the international assignment.

1.3 RESEARCH METHOD

The research method for each of the three articles that are submitted for the purposes of this thesis consists of a brief literature review and an empirical study. Because separate chapters were not targeted for literature reviews, these paragraphs focus on aspects relevant to the empirical studies that were conducted. The reader should note that a literature study was conducted for the purpose of each article.

1.3.1 Research design

A survey design is used to achieve the research objectives. The specific design is the cross-sectional design, whereby a sample is drawn from a population at one time (Shaughnessy & Zechmeister, 1997). Information collected is used to describe the population at that time. This design can also be used to assess interrelationships among variables within a population. According to Shaughnessy and Zechmeister (1997), this design is ideally suited to the descriptive and predictive functions associated with correlational research. There are serious

limitations, however, when using the results of this type of research to make inferences about causal relationships (Huysamen, 1993).

1.3.2 Participants

The study population consists of expatriates from eight multinational companies in South Africa. Questionnaires were sent to all expatriates from the multinational companies based in South Africa who have been on the international assignment for a period of longer than three months. These expatriates were from 21 different countries (Australia, Canada, Dubai, Germany, Guinea, Hong Kong, Isle of Man, Iran, Mali, Malawi, Malaysia, Mozambique, the Netherlands, Scotland, Singapore, Tanzania, United Kingdom, United States of America, Venezuela, Zambia, Zimbabwe). For the purpose of the first article, the sample used ($N = 69$) was from the largest multinational chemical company in South Africa as well as a multinational open cast mining company. These expatriates were from 12 different countries (Australia, Dubai, Germany, Guinea, Hong Kong, Isle of Man, Malawi, Malaysia, Mali, Mozambique, Singapore, Tanzania, United Kingdom, United States of America, Venezuela, Zimbabwe, Zambia, Zimbabwe). The second and third articles made use of complete data sets (where all questionnaires were completed) and a sample of $N = 95$ was used. It is important to note that although large diverse sample sizes are both desirable and encouraged, it is somewhat challenging to gain access to several expatriates in any one company.

1.3.3 Measuring instruments

The following questionnaires were used in this study:

A biographical questionnaire was developed to gather information about the demographic characteristics of the participants. This questionnaire gave participants the option of supplying their name and the name of the company. Other information that was gathered included: age, sex, marital status, length of time on the international assignment, similarity of language spoken between home and host country, satisfaction with pre-departure training, if received, expatriates accompanied by family and satisfaction with support received from family, company, host nationals, friends and colleagues, and expatriates' motivation for accepting the international assignment.

The *Expatriate Stress Inventory* (ESI) was developed for the purpose of this study. In the expatriate context a limited number of research studies have been published regarding stressors specific to the expatriation environment (Caligiuri, 1997; Caligiuri et al., 2001; Caligiuri & Lazarova, 2002; Caligiuri & Phillips, 2003; Hechanova et al., 2003; Vollrath, 2001). These sources were used as theoretical foundation in the construction of the current instrument. In line with recommendations by Biggam et al. (1997, p. 130) this study addressed both the severity and frequency of stressors. Firstly, participants rated each of 24 items regarding the intensity of stress on a 9-point scale. The frequency part of the questionnaire asked "how many times in the last six months" the source of stress had been experienced.

A self-rated *performance appraisal instrument* (PAI) was developed for purposes of this study. The items were developed based on interviews conducted with former expatriates prior to the beginning of this study as well as research by Caligiuri (1997), and Gregersen et al. (1996). The aim of the items was the inclusion of both technical and contextual performance dimensions. Caligiuri (2000a) reported Cronbach alpha coefficient of 0,83 for a similar but supervisor-rated 9-item measurement. Van der Bank and Rothmann (2003) found alpha coefficients of 0,86 for Motivation and 0,75 for Relationship as facets of expatriates' supervisor-rated performance.

The desire to terminate the assignment is measured by three items. The expatriates' responses to the following items were measured on a 4-point scale ranging from 1 (*definitely not*) to 4 (*yes definitely*): "Would you like to terminate this expatriate assignment early?", "If this assignment had no effect on your career or your spouse's career, would you terminate this assignment now?" and "Do you hope that you will be asked to return home early?" This measure has an alpha coefficient of 0,82 (Caligiuri, 2000a). In their research on the expatriate sample, Van der Bank and Rothmann (in press) found an alpha value of 0,78 for the TAS and Caligiuri (2000a) found an alpha value of 0,78 for a similar measurement.

The *Cross-cultural Adjustment Scale* (CCAS) was developed for purposes of this study, based on a similar measurement developed by Caligiuri et al. (2001). Expatriates rated their cross-cultural adjustment on a five-item scale. Each item was rated on a five-point scale varying from 1 (*not at all*) to 5 (*to a great extent*). Sample items include "Rate your adjustment to your current living conditions." and "Rate your adjustment to living in the

country in general." A high score indicated greater cross-cultural adjustment. Caligiuri et al. (2001) reported an alpha coefficient of 0,83 for a similar cross-cultural adjustment scale.

The *NEO Personality Inventory Revised (NEO-PI-R)* (Costa & McCrae, 1992) measures the personality of participants based on the five-factor model of personality. The revised edition of the NEO-PI-R (compared with the original questionnaire) showed an improved factor structure. The Cronbach alpha coefficient of the scales of the NEO-PI-R varied from 0,86 to 0,95, which is very high. Costa and McCrae (1992) showed construct validity for the NEO-PI-R. The correlations of the five dimensions are 0,07, 0,10, 0,08, 0,09 and 0,08, which are all very close to 0 (Costa & McCrae, 1992). Costa and McCrae (1985) as well as Van der Bank and Rothmann (2003) found that, when factor-analysed, the five familiar factors emerged as expected, and these results provided strong evidence of convergent and discriminant validity of the NEO PI-R (McCrae, 1990).

The *Work Locus of Control Scale (WLCS)* (Spector, 1988) measures participants' locus of control within the work environment. The WLCS consists of 16 items. Spector (1988) found Cronbach alpha coefficients for the WLCS varying between 0,75 and 0,85. In an attempt to validate the WLCS, Spector (1988) correlated it against work variables, which had been correlated previously with Rotter's scale. He reported that many of the correlations between work locus of control and organisational variables were stronger than the correlations observed between those same variables and Rotter's scale. Maram en Miller (1998) and Spector (1988) found evidence for the construct validity of the WLCS. Spector (1988) argued that the WLCS predicts work behaviour more precisely than general scales, which measure locus of control. In research done on the WLCS in the context of expatriates, Van der Bank and Rothmann (2003) found an alpha coefficient of 0,82 for the WLCS and, based on their results, the alpha coefficients and inter-item correlation coefficients supported the internal consistency and construct validity of the WLCS for the expatriates.

The *COPE* is a multidimensional 53-item coping questionnaire that indicates the different ways that people cope in different circumstances (Carver, Scheier & Weintraub, 1989). Response choices ranged from 1 (*I usually don't do this at all*) to 4 (*I usually do this a lot*). The COPE measures 14 coping strategies, namely, Active Coping, Planning, Suppression of Competing Activities, Restraint Coping, Seeking Social Support for Instrumental Reasons, Seeking Social Support for Emotional Reasons, Focusing on and Venting of Emotion,

Behavioural Disengagement, Mental Disengagement, Alcohol and Drug Disengagement, Denial, Positive Reinterpretation and Growth, Acceptance, and Turning to Religion. Test-retest reliability varies from 0,46 to 0,86 and 0,42 to 0,89 (applied after two weeks). Storm and Rothmann (2003) found acceptable alpha values with inter-item correlation coefficients varying between 0,25 (Acceptance) and 0,65 (Turning to Religion), showing acceptable levels of internal consistency for this questionnaire. Pienaar and Rothmann (2003) extracted four internally consistent factors, namely Active Coping, Avoidance, Seeking Emotional Support and Turning to Religion. They found acceptable alpha values varying from 0,80 to 0,92 and acceptable mean inter-item correlation coefficients indicating the internal consistency of the extracted factors of the COPE. In their research on an expatriate sample, Van der Bank and Rothmann (2003) found acceptable alpha coefficients of the following coping strategies: Turning to Religion, Active Coping, Planning, Restraint coping, Seeking Social Support (Instrumental), Positive Reinterpretation and Growth, Acceptance, Focus on Venting of Emotions, Denial, and Behavioural disengagement (guideline of Nunnally and Bernstein, 1994). However, they found the alpha coefficients of Suppression of Competing Activities and Mental Disengagement not acceptable.

1.3.4 Statistical analysis

The statistical analysis was carried out by means of the SPSS program (SPSS Inc., 2003). Descriptive statistics (e.g., means, standard deviations, skewness and kurtosis) were used to explore the data. Exploratory factor analyses and Cronbach's alpha coefficients were computed to assess the validity and reliability of the constructs measured in this study. A simple principal components analysis was conducted on the constructs which formed part of the measurement model. The eigenvalues and scree plot were studied to determine the number of factors. Subsequently, either a principal factor analysis with a direct Oblimin rotation was conducted if factors were related, or a principal component analysis with a Varimax rotation was used if the factors obtained were not related (Tabachnick & Fidell, 2001). The theoretical models used in the study were tested in regression analyses. Independent T-test for independent samples and one-way analysis of variance (ANOVA) were used to determine differences between the sub-groups in the sample. The following formula was used to determine the practical significance of differences (d) when t-tests were used (Steyn, 1999):

$$d = \frac{Mean_A - Mean_B}{SD_{MAX}}$$

where

$Mean_A$ = Mean of the first group

$Mean_B$ = Mean of the second group

SD_{MAX} = Highest standard deviation of the two groups

The following formula was used to determine the practical significance of difference in means between two groups (Steyn, 1999):

$$d \approx \frac{Mean_A - Mean_B}{\text{Root MSE}}$$

where

$Mean_A$ = Mean of the first group

$Mean_B$ = Mean of the second group

Root MSE = Root Mean Square Error

A cut-off point of 0,50 (medium effect, Cohen, 1988) was set for the practical significance of differences between means.

Pearson product-moment correlation coefficients were used to specify the relationships between the variables. In the case where the distribution of scores was skew, Spearman correlation coefficients were computed. A cut-off point of 0,30 (medium effect, Cohen, 1988) was set for the practical significance of correlation coefficients.

Because a non-probability sample was used in this research, effect sizes (rather than just inferential statistics) were used to decide on the significance of the findings. Analysis of variance was used to determine the differences between the Big Five personality dimensions, locus of control, coping and stress of expatriates and their spouses. A stepwise multiple regression analysis was conducted to determine the percentage of the variance in the

dependent variables (desire to terminate the assignment, performance and cross-cultural adjustment) that was predicted by the independent variables (the Big Five Personality characteristics, locus of control, coping, stress and biographical information).

1.4 CHAPTER DIVISION

The chapters are presented as follows in this research:

- Chapter 1: Introduction
- Chapter 2: Coping strategies, locus of control and expatriates' desire to terminate the assignment
- Chapter 3: Dispositional factors, locus of control, expatriates' cross-cultural adjustment and their desire to terminate the assignment
- Chapter 4: Predictors of expatriates' success
- Chapter 5: Conclusions, limitations and recommendations

1.5 CHAPTER SUMMARY

This chapter set out the problem statement, the aims of the research, the research method employed and the chapter division. Chapter 2 is the first research article.

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CHAPTER 2

RESEARCH ARTICLE 1

COPING STRATEGIES, LOCUS OF CONTROL AND EXPATRIATES' DESIRE TO TERMINATE THE ASSIGNMENT

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ABSTRACT

The objective of this study was to assess the relationship between locus of control, coping and expatriates' desire to terminate the assignment. A cross-sectional survey design was used. A convenient sample ($N = 69$) was taken of expatriates of two multinational South African companies. The Coping Orientations to the Problems Experienced Questionnaire, Work Locus of Control Scale (WLCS) and Expatriates' Desire to Terminate the Assignment Scale were administered. External Locus of Control was found to be an internally consistent factor for WLCS. External Locus of Control was the best predictor of avoidance coping, while Internal Locus of Control was the best predictor of approach coping. No empirical evidence could be found for a relationship between locus of control and desire to terminate the assignment or coping and the desire to terminate the assignment.

OPSOMMING

Die doelstelling van hierdie studie was om die verwantskap te bepaal tussen lokus van beheer, coping en geëkspatrieerdes se wens om die internasionale opdrag te beëindig. 'n Dwarsdeursnee-opname ontwerp is gebruik. 'n Gerieflikheidsteekproef ($N = 69$) is geneem van geëkspatrieerdes in twee multinasionale Suid-Afrikaanse maatskappye. Die "Coping Orientations to the Problems Experienced Questionnaire", Werk-lokus-van-beheer-Skaal (WLCS) en die geëkspatrieerdes se wens om die internasionale opdrag te beëindig is as meetinstrumente gebruik. Daar is gevind dat Eksterne Lokus van Beheer 'n intern konsekwente faktor vir die WLCS is. 'n Eksterne lokus van beheer was die beste voorspeller van vermyding as coping-strategie. 'n Interne lokus van beheer was die beste voorspeller van aktiewe coping. Geen empiriese bewyse kon gevind word van 'n verhouding tussen lokus van beheer en geëkspatrieerdes se wens om die internasionale opdrag te beëindig nie, asook van een tussen coping en geëkspatrieerdes se wens om die internasionale opdrag te beëindig.

World-wide there seems to be a tendency for organisations to drift from domestic to global, no matter how small the organisation (Furnham, 1997). Evidence of this international mobility can be seen in the frequency with which multinational companies send their employees on expatriate assignments. In a 1998 survey of 177 multinational companies, most of the respondents stated that their number of expatriate assignments had increased and 63% of this sample believed that this rate of growth would continue in the future (Windham International, 1998). One of the consequences of South Africa's becoming part of the global business community is that there has been a vast increase in the number of South Africans taking up assignments outside the country (Hawley, 1995, 1999). Expatriate assignments are important to the success of multinational companies because they can help build the level of global competence within the organisation (Stohl & Caligiuri, 1998; Tung & Miller, 1990), and expatriates often fill critical positions in host countries (e.g. new market development, technology transfer, joint venture negotiations and subsidiary management).

The wellness of expatriates is a prerequisite for the synergetic rendering of outputs. Various researchers (Black & Gregersen, 1991; Brewster & Hegewisch, 1994; De Cieri et al., 1991, Forster, 1992; Guzzo et al., 1994; Tung, 1987) suggested that expatriate assignment failures can be attributed to the failure to adjust. Antonovsky (1987) stated that the adequacy of tension management when confronted with omnipresent stressors determines whether the outcome is pathological, neutral or salutary. Therefore, one should contrast the focus on stressors with a concern with coping mechanisms, accepting that expatriates find themselves in a stressor-rich environment. In addition, it could be expected that psychological strengths, which are healthy, positive and pro-social, should be a buffer against the expatriate's desire to terminate the assignment which are costly and detrimental to the company's future in the host country.

The psychological strength locus of control is described in the literature as the extent to which individuals feel that they play a causative role in events in their lives. It is also conceptualised as the extent to which individuals believe that the outcomes of their behaviour are under their personal control (internal locus of control), or under the control of the environment, luck or fate (Rahim & Psenicka, 1996). Thus, expatriates with an internal locus of control will be more likely to take responsibility for their actions and the consequences thereof, use more effective coping mechanisms to adjust to the host country and work independently to reach objectives, and they are less likely to succumb to stress because they

believe they have control over the outcomes of their situation. In addition, expatriates with an external locus of control are less likely to handle pressure, uncertainty and challenges in stressful situations, because they believe that they do not control the outcomes of their situation. Thus, locus of control and coping strategies could play a role in expatriates' desire to terminate the assignment.

Consequently, the aims of this study were to assess the reliability and validity of the Coping Orientations to the Problems Experienced Questionnaire, Work Locus of Control Scale and Expatriates' Desire to Terminate the Assignment Scale and to establish the relationship between locus of control and coping as predictors of expatriate's desire to terminate the assignment.

Coping, locus of control and desire to terminate an assignment

The *desire to terminate the assignment* is the most basic behavioural criterion for assessing cross-cultural adjustment. Success, according to this construct, occurs when an expatriate remains in the host country for the entire scheduled duration of his or her assignment. The desire to terminate the assignment refers to an expatriate's requesting or being requested to return to his or her home country before the assignment is completed.

This criterion, while important, can often be obscured by other intervening causes and should be evaluated carefully. For example, expatriates may be sent overseas without a clear goal of how long the assignment is supposed to last (either in terms of goal or a project goal). Even when the duration of the assignment is known at the onset of the assignment, other organisational factors (having no relationship with the expatriate's success on the assignment) may force an expatriate to return early. For example, management may decide that an expatriate's skills are needed in a different location and may recall an expatriate before his or her assignment is completed to work elsewhere. In addition to organisational causes, other personal factors (again having no relationship with the expatriate's performance) may affect how long they remain on the assignment (e.g. a seriously ill parent back home). In the appropriate use of premature termination as a criterion, expatriates choose either to stay on the assignment, or decide that the assignment is too difficult and return home. The motivation for returning may be difficult to ascertain, given that more socially appropriate reasons may be given by an expatriate who, himself or herself, could really not handle being overseas.

Thus, assessment of the expatriates' decision state or attitude regarding their desire to remain on the assignment is a viable alternative. This is an affective criterion (desire to remain or to leave) rather than a behavioural one (actually remaining and actually leaving prematurely).

Various researchers (e.g. Black & Mendelhall, 1990; Caligiuri, 1997; Kealey & Protheroe, 1996) showed that the success of a global assignment is greatly influenced by an expatriate's *cross-cultural adjustment* to the host country. Cross-cultural adjustment is the extent to which individuals are psychologically comfortable living outside their home country (Black, 1990; Black & Gregersen, 1991). Cross-cultural adjustment incorporates both a psychological dimension (feelings of well-being and satisfaction) and a sociocultural component (ability to fit in), and negative interactive aspects of the new culture. From a theoretical perspective it then becomes imperative to differentiate between psychological and sociocultural dimensions in the prediction of adjustment (Searle & Ward, 1993; Ward & Searle 1991).

Although these notions are conceptually interrelated, they refer to different phenomena. Psychological adjustment deals with subjective well-being (e.g., depression, anxiety, tension and fatigue), while sociocultural adjustment relates to culture-specific skills, the ability to negotiate the host culture, or general intercultural competence as measured by the amount of difficulty experience in the management of everyday situations in the host culture (Ward & Chang, 1997; Ward & Kennedy, 1996). According to Searle and Ward (1993), psychological adjustment can best be understood within a clinically oriented framework of a stress and coping model, with depression predicted by life changes and satisfaction with relationships with host nationals and social difficulty.

Hence, one of the basic issues in the expatriate's behaviour domain concerns *coping* or ways in which an individual can attempt to deal with environment and job stressors to ward off aversive strains (Beehr, Johnson & Nieva, 1995). Kohn (1996) contends that "the most important thing about how a person copes with everyday hassles ... is its circumstantial appropriateness, how well it fits the specific demands of the situation" (p. 182). Kleinke (1991, p. 3) defined coping as "the efforts we make to manage situations we have appraised as potentially harmful or stressful". Thus, coping refers to perceptual, cognitive or behavioural responses that are used to manage, avoid or control situations that could be regarded as difficult (Moos, 1994; Zeidner & Endler, 1996).

In the literature concerning expatriates, coping strategies are defined in the context of cross-cultural adaptation and the level of stress an individual experiences, as well as the extent to which adverse effects such as psychological and other strains occur, depends on how effectively the individual copes with stressful situations (Bhagat et al., 2001). There is a growing body of research that supports the contention that the ways people cope with stress and daily living affect their psychological, physical and social well-being (Ben-Zur, 1999; Friedman & Vandebos, 1992). In a recent review of personality and stress, Vollrath (2001) states that coping dispositions predict a variety of human faculties. These include information processing, attentive orientation and emotional processing in demanding, ambiguous, anxiety-provoking, or irritating situations. Coping strategies represent the efforts, both behavioural and cognitive, in which people invest in order to deal with stressful encounters (Lazarus & Folkman, 1984). Coping has been conceived in several different ways (Livneh, Antonak & Gerhardt, 2000, p. 236): a) both as personality trait and situationally determined response; b) as dynamic process and as static construct; c) as a strategy, that is mature, adaptive and flexible, but also a reaction, that is neurotic, maladaptive and rigid; and d) as a global, generally dichotomous concept, but also an intricate, hierarchically structured, multilevel concept.

Originally, two coping functions, problem-focused and emotion-focused, were proposed, which could be further subdivided into different strategies (Lazarus & Folkman, 1984). According to Folkman and Lazarus (1980), *Problemfocused* coping includes strategies focused on dealing with the stressor itself. In some situations one might gather information about a problem and formulate a plan of action in order to alter or eliminate the stressor. *Emotionfocused* coping refers to efforts to deal with one's emotional response to a stressor (Lazarus, 1966). Parker and Endler (1992) demonstrated that these dimensions have been found in nine out of 13 studies. However, the exact boundaries between these functions have remained blurred, for there are many strategies serving both functions. Endler and Parker (1990) suggest that the third basic strategy that may be used in coping with stress is avoidance. Avoidance can include either person-oriented or task-oriented strategies. Avoidance differs from problem- and emotion-focused coping in that avoiding a situation actually removes the person from the stressful situation, whereas problem- and emotion-focused coping might help the person manage the stressful situation while he or she remains in it (Kowalski & Crocker, 2001).

In addition to avoidance as coping dimensions (Amirkhan, 1990; Endler & Parker, 1990; Parker and Endler, 1992), cognitive reappraisal (Carver, Scheier & Weintraub, 1989) and the seeking of social support (Amirkhan, 1990; Carver et al., 1989) have been added. Exploratory and confirmatory factor analysis of dispositional and situational coping item sets generated by Stanton et al. (2002) indicated two distinct emotional approach coping factors, namely emotional processing (active attempts to acknowledge and understand emotions) and emotional expression. Various researchers (Carver & Scheier, 2002; Salovey, Mayer & Caruso, 2002; Snyder et al., 2002; Watson, 2002) supported emotional approach coping and avoidance coping as factors of coping. However, the interrelation between emotion-focused or problem-focused coping in the expatriation context remains unclear.

Abe and Wiseman (1983) as well as Mendenhall and Oddou (1988) found that the ability to handle stressful situations and have the confidence in one's abilities positively related to cross-cultural adjustment. Mendenhall and Oddou (1985) proposed that having a self-orientation was important for the cross-cultural adjustment of expatriates. Self-orientation encompasses characteristics that enable the expatriate to maintain mental health, psychological well-being and effective stress management. Other characteristics related to self-orientation, such as self-esteem, self-confidence and being comfortable with oneself, have also been linked to cross-cultural adjustment (Abe & Wiseman, 1983; Black, 1988; Mendenhall & Oddou, 1988). Additionally, individuals with an internal locus of control (a belief that they themselves have control over their own "destiny") are less likely to doubt the efficacy of their attempts to confront a problem than individuals with external control beliefs (beliefs that success or failure is attributable to outside forces). Consequently, internal dispositional control beliefs should be associated with positive adjustment to stress and the new environment. Based upon the discussion of the above-mentioned constructs, it is expected that an expatriate's locus of control and coping mechanisms will be related to their desire to terminate the assignment.

Rotter (1966) developed *locus of control* as a personality variable that denotes the degree to which individuals perceive that they either control or are controlled by their environment. Spector (1988) defined locus of control as the generalised expectancy that rewards, reinforcements or outcomes in life are controlled either by one's own actions or by other forces. Locus of control is a cognitive construct and is about control (Rotter, 1966) while coping refers to cognitive and behavioural efforts to manage (master, reduce or tolerate) a

troubled person-environment relationship (Folkman & Lazarus, 1985). Locus of control is concerned with the confidence in being able to control outcomes and guides the orientation towards coming events (Judge et al., 1998).

The concept of locus of control leads to anticipatory health-promoting orientations and views resources under the control of others as an external orientation and a failure to take control of one's own destiny. McCrae and Costa (1986) demonstrated the complexity of assessing the contribution of coping efforts to well-being. According to them, the same personality dispositions that predict the use of effective or ineffective coping mechanisms also predict important adaptational outcomes making causal inferences difficult. The main contribution of these arguments is that individual differences may relate not only to choice of coping strategy, but also to the effectiveness of coping efforts (Suls et al., 1996a, 1996b). It is expected that locus of control will influence the choice of coping strategy as individuals with an internal locus of control will probably feel that they can manage stressful situations in the work and non-work context, because these situations are seen as being within their personal control (Judge et al., 1998). Compared with individuals with an external locus of control, they will be less inclined to cope with frustrations by withdrawing or by reacting aggressively (Rahim & Psenicka, 1996; Spector, 1982).

According to Furnham (1997), expatriates often experience culture shock, which could be explained in various ways. Firstly, the experience of culture shock depends on how much one was attached to one's mother country. Secondly, locus of control type beliefs in fatalism or instrumentation best predict culture shock. The more fatalistic, the less adaptable people are. Thirdly, the more carefully migrants are self-selected or selected by other forces, the better they will be able to adapt to a culture change. Fourthly, the better an individual's social support network of friends, family and co-nationals, the better will be the individual's ability to overcome culture shock. Lastly, the social skills one possesses in dealing with people of the native culture are the best predictor of adaptation and culture shock.

There has been wide agreement that social interaction and social support during the global assignment is one of the most critical determinants of cross-cultural adjustment (Aycan, 1997a, 1997b; Black et al., 1991; Briody & Chrisman, 1991; Feldman & Bolino, 1999; Rogers & Ward, 1993; Searle & Ward, 1993; Ward & Chang, 1997). According to Shinn et al. (1984) as well as Shumaker and Bronwell (1984), this social support may reduce stress

and provide referent groups through which the new environment can be interpreted. Mayer and Sutton (1996) found that individuals with an internal locus of control are more successful in personal relationships than individuals with an external locus of control, and according to Caligiuri and Lazarova (2002) social interaction and social support are important factors in the cross-cultural adjustment of expatriates and their spouses. Thus it can be expected that expatriates with an internal locus of control will be more successful in forming personal relationships as a coping strategy whilst on the international assignment because expatriates who are able to establish relationships with both host nationals and other expatriates can effectively learn the social culture of the host country (Abe & Wiseman, 1983; Black, 1990; Searle & Ward, 1993).

According to Fontaine (1996), social support (e.g. from family, host national colleagues) helps mobilise psychological resources and serves to provide feelings of reinforcement, recognition and affirmation that can greatly enhance cross-cultural adjustment. Therefore, seeking social support as coping mechanism can also buffer against stress, resulting in expatriates' adjustment to the new environment and re-establishing their lives throughout the assignment (Aycan, 1997a, 1997b; Black, 1990).

Stanton, Danoff-Burg, Cameron and Ellis (1994) presented evidence that emotion-focused coping items and measures of distress are often confounded and that some emotional-approach coping items are significantly more strongly correlated with measures of distress when compared to other coping items. Thus, it could be expected that expatriates who are experiencing distress and who indicate a desire to terminate the assignment will seek out emotion-approach coping mechanisms in an attempt to adjust cross-culturally.

Little scientific research has to date been done regarding the coping strategies used by expatriates. The important issue is the identification of coping strategies that mediate expatriates' cross-cultural adjustment, resulting in the desire to stay on the international assignment. Given that social interaction and social support during the global assignment have been identified as one of the most critical determinants of cross-cultural adjustment it is expected that the use of seeking support from the host nationals, other expatriates or family members for emotional or instrumental reasons should mediate cross-cultural adjustment. In their sample expatriates of a chemical multinational company in South Africa, Van der Bank and Rothmann (2003) found the most commonly used coping strategies to be Positive

Reinterpretation and Growth, Planning, Seeking Social Support for Instrumental Reasons and Restraint coping.

Despite the anecdotal evidence that the desire to terminate the international assignment may be due to expatriates' ineffective coping mechanisms and consequent poor cross-cultural adjustment, there is no adequate empirical evidence testing this hypothesis. The locus of control construct is included in this study because it provides an indication of the extent to which a person believes that he/she can determine the results of his/her behaviour through applying effective coping mechanisms. Thus, work is warranted on the relationship between expatriates' desire to terminate the assignment, their locus of control and expatriates' coping mechanisms.

METHOD

Research design

A survey design was used to achieve the research objectives. The specific design was a cross-sectional design, by means of which a sample is drawn from a population at a particular point in time (Shaughnessy & Zechmeister, 1997). This design is suited to the current investigation into expatriates' desire to terminate the assignment, describing current prominent coping strategies and the locus of control of expatriates.

Participants

The study population consisted of 110 expatriates in the largest chemical multinational company in South Africa as well as a multinational open-cast mining company. Questionnaires were sent to the whole population and 69 expatriates responded to the questionnaire, resulting in a response rate of 63%.

Table 1

Characteristics of the Participants

Characteristic	Category	<i>n</i>	%
Gender	Male	62	90
	Female	7	10
	21-30 years	8	11
	31-40 years	29	42
	41-50 years	23	33
	51-60 years	9	13
Marital status	Married	56	81
	Unmarried/single/divorced	13	19

Questionnaires were sent to all expatriates in a large multinational company based in South Africa who have been on the international assignment for a period of longer than three months. These expatriates were from 12 different countries (Australia, Dubai, Germany, Guinea, Hong Kong, Isle of Man, Malawi, Malaysia, Mali, Mozambique, Singapore, Tanzania, United Kingdom, United States of America, Venezuela, Zimbabwe, Zambia, and Zimbabwe). The mean age of the expatriates was 39,5 years. Of the sample, 81% reported that they were married, and 90% were male.

Instruments

Three questionnaires were used in this research, namely the Coping Orientations to Problems Experience Questionnaire (COPE) (Carver et al., 1989), Work Locus of Control Scale (WLCS) and Expatriates' Desire to Terminate the Assignment Scale (TAS).

The *Coping Orientations to the Problems Experienced Questionnaire* (COPE) (Carver et al., 1989) was designed to measure both situational and dispositional coping strategies. In the present study, the dispositional version consisting of 53 items was used. Response choices were from 1 (*I usually don't do this at all*) to 4 (*I usually do this a lot*). The COPE measures 14 coping strategies, namely Active Coping, Planning, Suppression of Competing Activities, Restraint Coping, Seeking Social Support for Instrumental Reasons, Seeking Social Support for Emotional Reasons, Focusing on and Venting of Emotion, Behavioural Disengagement,

Mental Disengagement, Alcohol and Drug Disengagement, Denial, Positive Reinterpretation and Growth, Acceptance, and Turning to Religion. Carver et al. (1989) reported Cronbach alpha coefficients varying from 0,45 to 0,92. Test-retest reliability varies from 0,46 to 0,86 and 0,42 to 0,89 (applied after two weeks). Storm and Rothmann (2003) found acceptable alpha values with inter-item correlation coefficients varying between 0,25 (Acceptance) and 0,65 (Turning to Religion), showing acceptable levels of internal consistency for this questionnaire. Pienaar and Rothmann (2003) extracted four internally consistent factors, namely Active Coping, Avoidance, Seeking Emotional Support and Turning to Religion. They found acceptable alpha values varying from 0,80 to 0,92 and acceptable mean inter-item correlation coefficients indicating the internal consistency of the extracted factors of the COPE.

The *Work Locus of Control Scale* (WLCS) measures participants' locus of control within the work environment (Spector, 1988). The WLCS consists of 16 items and the expatriates' responses were measured on a 6-point Likert scale, varying from 1 (*disagree very much*) to 6 (*agree very much*). The WLCS consists of two dimensions, namely External Locus of Control (e.g. "Getting the job you want is mostly a matter of luck") and Internal Locus of Control ("A job is what you make of it"). Spector (1988) reported Cronbach alpha coefficients for the WLCS varying between 0,75 and 0,85. Maram and Miller (1998) and Spector (1988) reported evidence of the construct validity of the WLCS. Spector (1988) argued that the WLCS predicts work behaviour more precisely than general scales, which measure locus of control. Maram and Miller (1998) and Spector (1988) found that the WLCS has construct validity. Rothmann and Van Rensburg (2001) reported an alpha coefficient of 0,70 for the WLCS. In research done on the WLCS in the context of expatriates, Van der Bank and Rothmann (2003) found an alpha coefficient of 0,82 for the WLCS, and based on their results, the alpha coefficients and inter-item correlation coefficients supported the internal consistency of the WLCS for expatriates.

The *Desire to Terminate the Assignment Scale* (TAS) refers to an expatriate's requesting or being requested to return to his or her home country before the assignment is completed, and is measured by three items. The expatriates' responses were measured on a 4-point Likert scale varying from 1 (*definitely no*) to 4 (*definitely yes*). This measure has an alpha coefficient of 0,82 (Caligiuri, 2000). This is an affective criterion (desire to remain or to leave) rather than a behavioural one (actually remaining or actually leaving prematurely).

Van der Bank and Rothmann (2003) reported an alpha coefficient of 0,80 for the desire to terminate the assignment. With regard to this study, an alpha coefficient of 0,71 was found for the desire to terminate the assignment questionnaire.

Statistical analysis

The statistical analysis was carried out with the help of the SPSS program (SPSS Inc., 2003). Exploratory factor analyses were carried out to determine the construct validity of the measuring instruments. The following procedure was followed: Firstly, a simple principal component analysis was conducted on the constructs which form part of the measurement model. The eigenvalues and scree plot were studied to determine the number of factors. Secondly, a principal factor analysis with a direct oblimin rotation was conducted if factors were related ($r > 0,30$). Thirdly, a principal component analysis with a varimax rotation was used if the obtained factors were not related (Tabachnick & Fidell, 2001).

Internal consistencies of the measuring instruments were assessed by Cronbach alpha coefficients and inter-item correlations (Clark & Watson, 1995). Descriptive statistics (e.g. means, standard deviations, skewness and kurtosis) were also used to analyse the data. Because a non-probability sample was used in this research, effect sizes (rather than inferential statistics) were used to decide on the significance of the findings. Pearson product-moment correlation coefficients were used to specify the relationships between the variables. In this study, r -values larger than 0,10 (small effect, Cohen 1988) and 0,30 (medium effect, Cohen 1988) were considered practically significant. The researcher's theoretical model was tested in multiple regression analyses.

RESULTS

Construct validity of the instruments

Coping Orientations to the Problems Experienced Questionnaire (COPE). The 53 items of the COPE were divided into 14 parcels. A principal component analysis that was carried out on these parcels showed three factors, which explained 47,8 % of the total variance. Next, a principal component analysis with an oblimin rotation was conducted on the parcels. The

oblique rotation indicated inter-factor correlations below the cut-off of 0,30. Therefore it was decided to proceed with principal factor analysis with a varimax rotation.

The results from the varimax rotation showed that Active Coping (loading = 0,76), Planning (0,81), Suppressing Competing Activities (0,62), Acceptance (0,63) and Positive Reinterpretation (0,48) formed the first factor (labelled *Approach Coping*). Seeking Support for Emotional Reasons (loading = 0,87), Seeking Support for Instrumental Reasons (0,88) and Focusing on Venting of Emotions (0,58) formed the second factor (labelled *Seeking Emotional Support*). Turning to Religion (loading = 0,48), Denial (0,75), Mental Disengagement (0,75) and Behavioural Disengagement (0,51) formed the third factor (labelled *Avoidance coping*). The first factor dealt with approaching the problem, redefining it as something positive or a learning experience, and accepting that it has happened. Hence, this factor was labelled *Approach Coping*. The second factor was made up by the four items measuring Seeking Social Support for Emotional Reasons (Carver et al., 1989), and was labelled *Seeking Emotional Support*. The third factor had items that related to avoidance, such as daydreaming, and items related to ignoring the fact. This factor was labelled *Avoidance*. Communality values were moderate. With a cut-off of 0,45 for inclusion of a variable in interpretation of a factor, Restraint Coping (loading of 0,39 on Approach coping) and Alcohol and Drug Disengagement (loading = 0,32 on Avoidance coping) were discarded.

Thus, resemblance was found for the three factors identified by Amirkhan (1990), namely social/emotional, avoidance and approach coping (task- or problem-directed) factors, as well as support for emotional approach coping and avoidance coping as factors of coping, as identified by Carver and Scheier (2002), Salovey, Mayer and Caruso (2002), Snyder et al. (2002) and Watson (2002).

Work Locus of Control. A simple principal component factor analysis was carried out on the 16 items of the WLOC which measure Work Locus of Control. Next, a principal component analysis with an oblimin rotation was conducted on the parcels. The oblique rotation indicated inter-factor correlations below the cut-off of 0,30. Therefore it was decided to proceed with principal factor analysis with a varimax rotation.

The results from the scree plot indicated a two-factor solution which explained 63,69% of the total variance. The first factor, which was labelled External Locus of Control, includes the

following items: a) "Getting the job you want is mostly a matter of luck" (loading = 0,48); b) "Making money is primarily a matter of good fortune" (0,57); c) "In order to get a really good job you need to have family members or friends in high places" (0,75); d) "Promotions are usually a matter of good fortune" (0,69); e) "When it comes to getting a really good job, who you know is more important than what you know" (0,72); f) "To make a lot of money you have to know the right people" (0,69); g) "It takes a lot of luck to be an outstanding employee on most jobs" (0,63); h) "Most employees have more influence on their supervisors than they think they do" (0,55); and i) "The main difference between people who make a lot of money and people who make a little money is luck" (0,63).

The second factor, which was labelled Internal Locus of Control, includes the following items: a) "A job is what you make of it" (loading = 0,60); b) "On most jobs, people can pretty much accomplish whatever they set out to accomplish" (0,56); c) "If you know what you want out of a job, you can find a job that gives it to you" (0,63); d) "Most people are capable of doing their jobs well if they make the effort" (0,73); e) "Promotions are given to employees who perform well on their job" (0,50); and f) "People who perform their jobs well generally get rewarded for it" (0,54). The item "If employees are unhappy with decisions made by their boss, they should do something about it" did not load on one of the factors and was consequently excluded.

Descriptive statistics and internal consistency of the scales

Table 2 shows the descriptive statistics and alpha coefficients for the extracted COPE, WLOC and TAS factors.

Table 2

Descriptive Statistics and Alpha Coefficients of the Measuring Instruments

Factor	Mean	SD	Skewness	Kurtosis	α
External Locus of Control	19,70	6,48	0,70	0,29	0,82
Internal Locus of Control	31,15	3,03	-0,77	-0,16	0,70
TA	4,52	2,14	1,63	2,33	0,71
Approach Coping	74,35	7,12	0,01	0,13	0,75
Seeking Emotional Support	30,72	6,70	-0,08	-0,70	0,86
Avoidance	31,45	6,71	0,61	1,19	0,78

The alpha coefficients of the Approach Coping, Seeking Emotional Support, Avoidance, External Locus of Control, Internal Locus of Control and TA factors are acceptable compared to the guideline of $\alpha > 0,70$ (Nunnally & Bernstein, 1994). Therefore these scales show acceptable internal consistencies and construct validity. Table 1 demonstrates that the scores on the COPE and External Locus of Control are relatively normally distributed.

Regarding the skewness and kurtosis of expatriates' wish to Terminate the Assignment, Table 2 indicates a skewed distribution. These results suggest that most expatriates did not want to terminate the assignment (positively skewed distribution).

Correlations of the scales

In this study, Pearson's product-moment coefficient of correlation (r) was used to determine the linear relationship between the variables of the various measuring instruments. Spearman correlation (ρ) rather than Pearson correlation coefficients were used when skewness of the variables were higher than 1.

The correlation coefficients between the COPE, WLCS and Expatriates' Desire to Terminate the Assignment (Termination of Assignment) are reported in Table 3.

Table 3

Correlation Coefficients between the Variables

	1	2	3	4	5	6
1. External Locus of Control	-	-	-	-	-	-
2. Internal Locus of Control	-0,37 ⁺⁺	-	-	-	-	-
3. Termination of Assignment	0,03	0,02	-	-	-	-
4. Approach Coping	0,15	0,23	0,06	-	-	-
5. Seeking Emotional Support	0,16	-0,13	0,02	0,19	-	-
6. Avoidance	0,30 ⁺⁺	-0,02	0,10	0,20	0,18	-

* Statistically significant correlation: $r < 0,01$

⁺ Correlation is practically significant $r > 0,30$ (medium effect)

⁺⁺ Correlation is practically significant $r > 0,50$ (large effect)

Table 3 shows that expatriates with an external locus of control are negatively related to Internal Locus of Control, and positively related to Avoidance (all medium effects). Contrary to the expectation, no support was found for coping as related to desire to terminate the

assignment. However, the skew distribution regarding desire to terminate the assignment (indicating that most expatriates in this study did not want to terminate the assignment) as well as the sample size may explain the absence of significant relationships in this study. Additional to this, the literature study suggests that the combination of personality characteristics and coping strategies may contribute to lower motivation and poor adjustment to stress and a new environment (Mayer & Sutton, 1996).

Multiple regression analyses

The results of a multiple regression analysis with Avoidance Coping (as measured by the COPE) as dependent variables and expatriates' Locus of control (as measured by the WLOC) as independent variable are shown in Table 4. A significance level of $p < 0,01$ was set.

Table 4

Regression Analysis with Avoidance as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	R^2	ΔR^2
		B	SE	Beta						
1	(Constant)	25,47	2,53		10,09	0,000	6,20	0,29	0,09	0,072
	External	0,30	0,12	-0,29	2,50	0,015				
2	(Constant)	17,91	10,02		1,79	0,078	3,39	0,31	0,09	0,005
	External	0,34	0,13	0,33	2,60	0,012				
	Internal	0,22	0,28	0,10	0,78	0,44				

Table 4 shows that 9% of the variance in the Coping mechanism Avoidance of expatriates is predicted by an External Locus of Control (9%) ($F = 3,39, p < 0,01$). This variable added to the prediction statistically increased the R^2 , with the highest increases when External Locus of Control ($\Delta R^2 = 0,09$) was entered into the multiple regression analysis. It seems that avoidance as coping mechanism is the best predictor of expatriates' External locus of control.

The results of a multiple regression analysis with Approach Coping (as measured by the COPE) as dependent variable and expatriates' Locus of control (as measured by the WLOC) as independent variable are shown in Table 5. A significance level of $p < 0,01$ was set.

Table 5

Regression Analysis with Approach Coping as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	(Constant)	71,10	2,77		25,65	0,000	1,52	0,15	0,02	0,023
	External	0,17	0,14	0,15	1,24	0,221				
2	(Constant)	44,64	10,50		4,25	0,000	4,22	0,34	0,12	0,092
	External	0,34	0,13	0,33	2,60	0,035				
	Internal	0,22	0,28	0,10	0,78	0,011				

Table 5 shows that 12% of the variance in Approach Coping of expatriates (as measured by the COPE) is predicted by locus of control. However, Internal Locus of Control (9%) ($F = 4,22, p < 0,01$) is the only significant predictor of Approach Coping. This variable added to the prediction statistically increased the R^2 , with the highest increases when Internal Locus of Control ($\Delta R^2 = 0,09$) was entered into the multiple regression analysis.

DISCUSSION

The aims of this study were to assess the relationship between locus of control, coping and expatriates' desire to terminate the assignment. Another objective of this study was to determine the underlying coping dimensions of the COPE when applied in the expatriate context. External Locus of Control was found to be an internally consistent factor for the Work Locus of Control Scale. External Locus of Control was the best predictor of avoidance coping, while Internal Locus of Control was the best predictor of Approach Coping. No empirical evidence could be found for a relationship between locus of control and desire to terminate the assignment or coping and the desire to terminate the assignment.

Since the origination of the COPE, factor analyses of the items have resulted in varying underlying structures. Studies based on factor analyses produced taxonomies consisting of three (Kallasmaa & Pulver, 2000), four (Fortune et al., 2002; Ward & Kennedy, 2001) and five (Finch, Panter & Caskie, 1999; Sica et al., 1997) factors. Apart from finding different numbers of factors, factor structures also do not replicate consistently across studies. The factor analysis of the COPE items yielded a three-factor solution, namely Approach Coping,

Seeking Emotional Support and Avoidance. Carver et al. (1989) and Pienaar and Rothmann (2003) proposed four factors, and the current study bears some resemblance to that. The resemblance can be found in the social/emotional, avoidance and approach active coping (task- or problem-directed) factors. These factors also closely resemble three identified by Amirkhan (1990). Strong support thus exists for the conclusion of Kallasmaa and Pulver (2000) that a minimum of three factors are needed to explain coping data adequately (Bishop et al., 2001; Kallasmaa & Pulver, 2000; Lyne & Roger, 2000; Mitchell & Hastings, 2001). No support was found for Turning to Religion as a separate factor. Turning to Religion formed part of an avoidance coping strategy.

However, direct comparison of the current results with those of Carver et al. (1989) is impossible, because the item loadings on the proposed primary factors were not reported. The first and second factors extracted in this study reflect the known styles of Approach Coping and Avoidance. The second factor clearly deals with an avoidant type of approach, including items that refer to giving up, denying the reality of the situation/problem and turning to religion to cope. The three items measuring Seeking Social Support for Emotional Reasons (Carver et al., 1989) made up the third factor. The highest loadings were shown for the Seeking Emotional Support factor, but loadings on Approach Coping were also significant.

The findings of this study partly support a proposition originally put forward by Cox and Ferguson (1992), that coping dimensions could be classified as problem-focused, emotion-focused, reappraisal and avoidance. The factor identified as Approach Coping in this study probably overlaps with problem-focused coping (and seems to be a cognitive-behaviour coping strategy). It would include active efforts at cognitively and behaviourally dealing with the source of stress. The second factor extracted in this study, namely Avoidance, has to do with cognitive and behavioural disengagement and avoidance. Seeking Emotional Support, the third factor extracted in this study, is related to the affective dimension of human beings, and dealing with the emotional reactions evoked by the stressful situation. However, a surprising non-finding was the lack of evidence of the relationship between coping and expatriates' desire to terminate the assignment. The skew distribution regarding locus of control, indicating that most expatriates reported an internal locus of control, may explain the absence of significant relationships in this study.

External Locus of Control was found to be an internally consistent factor for the WLCS and related to Avoidance, and Internal Locus of Control as an internally consistent factor was found to be related to Approach Coping. Thus, support was found for the hypothesis, namely that locus of control will influence the choice of coping strategy of individuals.

The findings of this study support in part a proposition originally put forward by Rahim and Psenicka (1996) as well as Spector (1982), namely that expatriates' with an external locus of control will be less inclined to cope with frustrations and would use Avoidance as coping mechanism. Thus, based on the results of this study, internal dispositional control beliefs can be associated with positive adjustment to stress and the new environment.

Another objective of this study was to assess the relationship between locus of control and coping. The results showed that an external locus of control was the best predictor of avoidance coping of expatriates. Furthermore, expatriates with an internal locus of control were more inclined to use approach coping strategies in managing stressful situations in the work and non-work context, because these situations are seen as being within their personal control (Judge et al., 1998; Rahim & Psenicka, 1996). However, no empirical evidence could be found for a relationship between locus of control and desire to terminate the assignment. The reason may be the skew distribution of the data, and that most expatriates indicated that they did not want to terminate the assignment.

The sample was one limitation of this study, contributing to restriction of range. This study was conducted with two South African-based multinational organisations. Although the expatriates in these organisations seemed, in many respects, typical of expatriates in many South African companies, future studies should attempt to replicate the findings with other organisations in diverse industries. This study used a cross-sectional design to study the relationships between personality dispositions, coping and adjustment of expatriates. Thus, causal relationships cannot really be deduced with this design. It is recommended that future research use a longitudinal or experimental design in order to determine causal relationships.

In addition, these expatriates were assigned to a wide variety of countries. Statistical power in this study was also a concern, given the relatively small sample size.

RECOMMENDATIONS

It is recommended that future studies include country analyses if the sample size allows it in order to test universality of coping strategies and locus of control as predictors of expatriate desire to terminate the assignment. It is also recommended that future studies examine actual behaviours to remain in, or terminate, global assignments, seeing that the desire to terminate the assignment is an affective response instead of the expatriates' actual behaviour of either terminating or completing their assignments.

In general, it can be said that the expatriates of the two multi-national companies show constructive coping strategies. Expatriates could benefit from a training program in coping skills and locus of control. The effectiveness of such training depends upon whether any change in the individual's locus of control and/or coping strategies will be adequate to reduce the amount of strain the individual actually experiences, either in the short or the long term. It is therefore necessary to investigate coping strategies in conjunction with factors leading to stress. If sample size allows, future studies could also investigate structural equivalence and items bias and identify coping strategies according to country analysis. It is proposed that future research should look for at least three factors in coping, namely active, avoidant/passive and social/emotional factors.

Following other researchers (Kowalski & Crocker, 2001), it is also recommended that studying the functions and effectiveness of coping strategies would facilitate a more complete understanding of coping. Future studies should attempt to sample a broader number of organisations to improve both sample size and generalisability.

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CHAPTER 3

RESEARCH ARTICLE 2

DISPOSITIONAL FACTORS, LOCUS OF CONTROL, EXPATRIATES' CROSS-CULTURAL ADJUSTMENT AND THEIR DESIRE TO TERMINATE THE ASSIGNMENT

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ABSTRACT

The objective of this study was to assess the relationships between personality traits, locus of control, expatriates' cross-cultural adjustment and their desire to terminate the assignment. A cross-sectional survey design was used. A convenient sample ($N = 95$) was taken of expatriates of various multinational companies. The Neo-Personality Inventory Revised, Work Locus of Control Scale, a Cross-cultural Adjustment Scale and a scale measuring expatriates' desire to terminate the assignment were administered. The results showed that expatriates' desire to terminate the assignment is related to their cross-cultural adjustment, and that personality dimensions are related to their cross-cultural adjustment and their desire to terminate the assignment. Personality dimensions explained 12% of the variance in expatriates' cross-cultural adjustment. Assertiveness and cross-cultural adjustment explained 17% expatriates' desire to terminate the assignment.

OPSOMMING

Die doelstelling van hierdie studie was om vas te stel of daar 'n verband bestaan tussen persoonlikheidstrekke, lokus van beheer, kruiskulturele aanpassing en geëkspatrieerdes se wens om die opdrag te beëindig. 'n Dwarsdeursnee-opnameontwerp is gebruik. 'n Gerieflikheidsteekproef ($N = 95$) is van geëkspatrieerdes in verskeie multinasionale maatskappye geneem. Die Neo-Personality Inventory Revised, Werk-lokus-van-beheer-Skaal, 'n Kruiskulturele Aanpassingskaal en 'n vraelys wat geëkspatrieerdes se wens om die internasionale opdrag te beëindig aandui, is as meetinstrumente gebruik. Die resultate het getoon dat geëkspatrieerdes se kruiskulturele aanpassing verband hou met hul wens om die internasionale opdrag te beëindig, en dat persoonlikheidsdimensies verband hou met geëkspatrieerdes se kruiskulturele aanpassing en hul wens om die opdrag te beëindig. Persoonlikheidsdimensies het 12% van die variansie in die kruiskulturele aanpassing van geëkspatrieerdes verduidelik. Selfgeding en kruiskulturele aanpassing het 17% van die variansie in geëkspatrieerdes se wens om die internasionale opdrag te beëindig voorspel.

Business corporations are going global and successful implementation of global strategies depends on getting the right people with the right skills at the right time, which typically requires the movement of people across national borders (Selmer, 1999). The evidence of this international mobility can be seen in the frequency with which multinational companies send their employees on expatriate assignments. In a 1998 survey of 177 multinational companies, most of the respondents stated that their number of expatriate assignments had increased and 63% of this sample believed that this rate of growth would continue in the future (Windham International, 1998). One of the consequences of South Africa's becoming part of the global business community is that there has been a vast increase in the number of South Africans taking up assignments outside the country (Hawley, 1995, 1999). Thus, global mobility is a reality and a necessity in today's international business environment (Punnett, 1997). To be able to effectively compete against major global competitors, international organisations need global competence within the organisation (Harvey, 1997; Lublin, 1996; Strohl & Caligiuri, 1998; Tung & Miller, 1990).

Expatriates often fill critical positions in host countries (e.g. new market development, technology transfer, joint venture negotiations and subsidiary management) (Strohl & Caligiuri, 1998; Tung & Miller, 1990). Congruent to the strategic importance of these assignments, failure of an expatriate may be costly and even detrimental to the future of a multinational company in a host country (Gregersen & Black, 1990). Thus, having a systematic means to predict who is likely to succeed in an expatriate assignment is critical for multinational companies (Porter & Tansky, 1999; Stanley & Ahern, 1998).

Researchers (Arthur & Bennett, 1995; Black, 1990; Ones & Viswesvaran, 1997; Van der Bank & Rothmann, 2003) have proposed that personality characteristics predict in part whether individuals will succeed in their expatriate assignments. Although many personality characteristics exist, researchers have found that five factors provide a useful typology or taxonomy for classifying them, and these are labelled the "Big Five" (Barrick & Mount, 1991; McCrae & John, 1992).

The extension of the Big Five personality characteristics as predictors of expatriate success can be theoretically justified through evolutionary personality psychology (Caligiuri, 2000a). Evolutionary personality psychology suggests that the Big Five personality characteristics are universal adaptive mechanisms for humans (Buss, 1991; MacDonald, 1998). For example, a

person who is agreeable, extraverted, emotionally stable, conscientious and open may have the ability to form important work relationships, get promoted and attain a higher status. These adaptive mechanisms include humans' ability to learn hierarchies in society (extraversion), their willingness to co-operate (emotional stability) and their propensity for innovation or astuteness in solving problems (openness) (Buss, 1991; Caligiuri, 2000b).

The theory of evolutionary personality can be applied to predicting expatriate success for two reasons: First of all, variation along the Big Five personality characteristics allow for individuals to successfully fill different niches or positions in society (MacDonald, 1998). Therefore, given the adaptive requirements of expatriate assignments, personality characteristics should help facilitate an individual expatriate's success. However, according to this theory, individuals will vary in regard to the extent to which they possess these personality characteristics necessary for expatriate success. Secondly, as universal adaptive mechanisms, the big five personality characteristics are utilised across contexts, situations and environments (Buss, 1991; MacDonald, 1998; McCrae & Costa, 1997).

As indicated previously, evolutionary personality theory can provide theoretical justification for personality characteristics as predictors of expatriate success. However, it can also explain the outcomes of expatriate assignments. According to MacDonald (1998), the adaptive mechanism of the theory also suggests that individuals who sense a negative outcome in a given situation will alter or withdraw from the situation. Thus, in the context of expatriate assignments, certain individuals will have personalities better suited to adapting their work and non-work lives in the host country, while others (once on the assignment) will sense their inability to succeed and will withdraw, or terminate the assignment.

Various researchers (Black & Mendelhall, 1990; Caligiuri, 1997; Kealey & Protheroe, 1996) showed that the success of a global assignment is greatly influenced by an expatriate's cross-cultural adjustment to the host country. For example, cross-cultural adjustment is negatively related to the premature termination of the assignment (Black, 1988; Caligiuri, 1997; Tung, 1981). In addition, personality (Caligiuri, 2000b; Ones & Viswesvaran, 1999), perceptions of host ethnocentrism (Florkowski & Fogel, 1999), perceived organisational support upon repatriation (Selmer, 1998), expatriate mentoring (Feldman & Bolino, 1999) and family adjustment (Caligiuri et al., 1998) were demonstrated as predictors of expatriate adjustment. Furthermore, many theorists have discussed the importance of individual characteristics in

predicting an expatriate's cross-cultural adjustment. Although the five-factor model of personality is useful in studying expatriates' job performance and desire to terminate the assignment, locus of control as psychological strength could be included, adding it to the emotional stability dimension (Strümpfer, 1995). It could be expected that internal locus of control as psychological strength should be a buffer against the expatriate's desire to terminate the assignment and poor cross-cultural adjustment.

Currently little research has been done on expatriates and the use of personality characteristics and locus of control as predictors of expatriates' cross-cultural adjustment and their desire to terminate the assignment. If it is found that the expatriate's desire to terminate the assignment and their cross-cultural adjustment are related to these variables, programmes such as recruitment, selection, induction and support could be considered to facilitate expatriates' cross-cultural adjustment and reduce their desire to terminate the assignment.

Dispositional factors and expatriate success

Evidence is accumulating that suggests that virtually all personality measures can be categorised under the umbrella of a five-factor model of personality, which has subsequently been labelled the Big Five (Digman, 1990; Goldberg, 1990; McCrae & John, 1992; for an opposing view, see Block, 1995). The five factor-model is consistent across different theoretical frameworks, assessment instruments, and ratings from different sources (Wiggings & Trapnell, 1997). The five major dimensions of personality, neuroticism, extraversion, openness to experience, agreeableness and conscientiousness were developed by acknowledging that personality traits are ordered hierarchically at different levels of breadth or abstraction (Goldberg, 1993). The traits emphasised in this taxonomic scheme are higher-order *superfactors* that exist at the summit of this hierarchy and, as such, represent the broadest, most general dimensions of individual differences. The broad scope of these traits enables researchers to examine dispositional characteristics in a reasonably comprehensive manner and is thought to represent the minimum number of traits necessary for adequately describing personality (Ones & Visweswaran, 1997).

Costa and McCrae's Revised NEO Personality Inventory (NEO-PI-R) (Costa & McCrae, 1992; Velting, 1999), a widely used measure of personality, operationally defines the Big Five personality dimensions as a descriptive classification of traits into broad domains as

neuroticism, extraversion, openness to experience, agreeableness and conscientiousness (Thoms, Moore & Scott, 1996; Tokar, Fischer & Subich, 1998). Consequently a discussion of the five factors follows, with reference to locus of control, expatriates' cross-cultural adjustment and their desire to terminate the assignment.

Dunn et al. (1995) showed that emotional stability was one of the most important attributes negatively related to counter-productivity. Given that stress is often associated with living and working in ambiguous and unfamiliar environments, emotional stability has been proposed as an important personality characteristic for expatriates' adjustment to the host country (Abe & Wiseman, 1983; Mendenhall & Oddou, 1985), as well as for the completion of an expatriate's assignment (Caligiuri, 2000a; Ones & Viswesvaran, 1997). With reference to the possible link between emotional stability and locus of control, Van der Bank and Rothmann (2003) found evidence that an external locus of control is positively related to Angry Hostility (a facet of Neuroticism). Research done by Caligiuri (2000a) indicated that emotional stability is positively related to expatriates' desire to remain on the assignment. However, when entered in the regression analyses with other personality characteristics, emotional stability seemed less important.

Conscientious individuals are efficient, competent, ambitious and dependable (Barrick & Mount, 1991; McCrae & Costa, 1987). Findings regarding the conscientiousness dimension suggest that it includes elements of Rotter's (1966) locus of control variable (Spector, 1982). Research done by Van der Bank and Rothmann (2003) indicated that an internal locus of control is related to Deliberation (a facet of Conscientiousness). Conscientiousness and its relationship with locus of control indicate that individuals higher in conscientiousness are likely to achieve more because they are pushed to action and problem solving through their ambition and perseverance (Zellers et al., 2000). Ones and Viswesvaran (1997) also proposed that Conscientiousness relates to the completion of the expatriate assignment. Caligiuri (2000a) found evidence suggesting that those who are conscientious will feel a greater sense of commitment to their tasks as Conscientiousness was positively related to supervisor-rated performance.

Costa and McCrae (1988) proposed that extraversion predisposes individuals toward positive affect and Zellers et al. (2000) are of the opinion that individuals higher in extraversion are expected to report more personal accomplishment. In the context of an expatriate assignment,

the same adaptive propensities would hold true, given those expatriates are socialised into their host country through others (Black, 1990; Searle & Ward, 1993). Therefore, the extraversion that is necessary to learn the social culture in the host country could be related to whether expatriates complete their assignment. Research done by Caligiuri (2000a) confirmed extraversion as a significant predictor of the expatriates' desire to terminate an assignment. Van der Bank and Rothmann (2003) supported these findings, indicating the connection between internal locus of control and Assertiveness and Excitement-seeking (facets of Extraversion).

According to Barrick and Mount (1991), it is likely that individuals high in Openness to Experience will perceive greater personal accomplishment in the cross-cultural adjustment to the host country and job performance. Black (1990) suggested that greater Openness to Experience is related to expatriate adjustment because individuals higher in this personality characteristic will have less rigid views of right and wrong, appropriate and inappropriate, and will be more likely to accept the new culture. Van der Bank and Rothmann (2003) found partial support in that an internal locus of control is positively related to Aesthetics (a facet of Openness). In contrast with expectations Caligiuri (2000a) found that Openness to Experience did not correlate negatively with expatriates' desire to terminate the assignment, nor did it correlate positively with their supervisor-rated performance.

Expatriates who are unrestricted by their predisposing personality should be able to establish more interpersonal relationships with host nationals. Past research has inferred that establishing friendships with host nationals greatly improve expatriates' ability to learn culturally appropriate social skills and behaviours (Searle & Ward, 1993), thus facilitating their cross-cultural adjustment. Situations in which Agreeableness appears to have high predictive validity are jobs that involve considerable interpersonal interaction, particularly when the interaction involves helping, co-operating with and nurturing others (Barrick et al., 1998; Mount et al., 1998). Although the discerning hierarchical positions can be achieved through Extraversion, the ability to form reciprocal social alliances is achieved through the personality characteristic of Agreeableness (Buss, 1991). Consequently, an expatriate's ability to form and maintain social alliances is related to his or her success on the assignment. Consistent with this, Ones and Viswesvaran (1997) proposed that Agreeableness would relate to interpersonal aspects of expatriate performance. In addition, Black (1990) suggests that an expatriate who is more agreeable reports greater cross-cultural adjustment; and cross-cultural

adjustment, in turn, relates to whether an expatriate will complete his or her assignment. Caligiuri (2000a) agrees in her findings that agreeableness relates to expatriates' desire to terminate their assignment.

Another disposition which might be related to expatriate success is locus of control. The tendency to perceive events and circumstances of the international assignment as stressful, ways to adjust or failing to adjust depends in part on the locus of control of the individual. Locus of control addresses the degree to which expatriates see their behaviour as contingent upon their own choices, as opposed to environmental factors beyond their control (Rotter, 1966). This construct forms a personality orientation that addresses the transactional process such individuals use in the adjustment to the unfamiliar that is often associated with the international assignment.

Spector (1988) defined locus of control as the generalised expectancy that outcomes in life are controlled either by one's own actions (internal locus) or by other forces (external locus). According to Judge et al. (1998), individuals with an internal locus of control will probably feel that they can manage or adjust to challenging situations, as these situations are seen as being within their personal control (<http://hsc.usf.edu/kmbrown/Locus>). Compared with individuals with an external locus of control, they will be more inclined to cope with frustrations by withdrawing or by reacting aggressively (Rahim & Psenicka, 1996). Thus it is expected that expatriates with an internal locus of control will feel that it is within their power to adjust to the international assignment and as a result they will not be inclined to withdraw from the situation by terminating the assignment early.

According to Mayer and Sutton (1996), individuals with an internal locus of control are more successful in personal relationships than individuals with an external locus of control (<http://www.eelab.newpaltz.edu>). Hence, expatriates with an internal locus of control should be able to form significant personal relationships with host nationals, and social interaction with host nationals is an invaluable source of information of culturally acceptable norms and behaviour, subsequently reducing uncertainties associated with the international assignment (Aycan, 1997a, 1997b; Black, 1990; Briody & Chrisman, 1991; Feldman & Bolino, 1999). Individuals with an internal locus of control (a belief in themselves having control over their own "destiny") are less likely to doubt the effectiveness of their attempts to confront a problem than individuals with external control beliefs (beliefs that success or failure is

attributable to outside forces). Thus internal dispositional control beliefs should be associated with positive adjustment to the new environment and the belief that the choice to stay on the assignment is within their perceived ability to control.

Expatriates' cross-cultural adjustment

Cross-cultural adjustment is the extent to which individuals are psychologically comfortable living outside their home country (Black, 1990; Black & Gregersen, 1991). Cross-culturally adjusted expatriates "represent a more integrative approach to a new culture, (they)... are open to the host culture, but integrate new behaviour, norms and roles into the foundation provided by (their) home cultures" (Church, 1982, p. 543). On the other hand, maladjusted expatriates are unable or unwilling to accept the host countries' behaviour, norms and roles; they view the host culture as inferior to their own. They tend to cling to their home cultures (e.g. other expatriates from their home country) whenever possible (Caligiuri, 2000b). Maladjusted expatriates also tend to show signs of emotional stress such as depression and homesickness (Caligiuri, 1997; Church, 1982). Very simply, cross-cultural adjustment is the extent to which expatriates are psychologically comfortable with living abroad (Black, 1990; Black & Gregersen, 1991).

Abe and Wiseman, (1983) as well as Mendenhall and Oddou (1985, 1988) proposed that there are three dimensions of individual characteristics that should be positively related to cross-cultural adjustment, namely self-orientation, perceptual-orientation and others-orientation. According to Mendenhall and Oddou (1985), the latter dimension is the dimension of individual characteristics affecting the expatriates' ability to interact effectively with host nationals. Thus, given the emphasis on social contact, these affiliating personality characteristics will be particularly important for expatriates' cross-cultural adjustment.

Self-orientation, the ability to handle stressful situations and have confidence in one's abilities, was found to be positively related to cross-cultural adjustment (Black, 1988). Mendenhall and Oddou (1985) proposed that having a self-orientation was important for the cross-cultural adjustment of both expatriates and their spouses. Self-orientation encompasses characteristics that enable the expatriate to maintain mental health, psychological well-being, self-efficacy, locus of control and effective stress management (Caligiuri & Cascio, 1998).

Perceptual orientation includes personality characteristics such as non-judgemental attitudes and openness to new cultural norms, values and behaviours. Expatriates who adjust well cross-culturally tend to be more intellectually curious, flexible and willing to accept cultural differences (Mendenhall & Oddou, 1985).

Mendenhall and Oddou (1985) suggested that the other-orientation dimension encompasses two types of individual characteristics: The first is the individual's ability to establish interpersonal relationships with host nationals. Consistent with personality theory, this would be a persons' sociability (Piedmont, McCrae & Costa, 1991). The second is the individual's willingness to communicate with host nationals. Again, according to personality theory, this would be a person's openness (Caligiuri, 2000b). Openness is further defined as the receptivity to learn and change in the new situation. In this context it is also the belief that the host country has something to offer that will assist in developing, growing and learning. Therefore, openness and sociability can be identified as relationship-building characteristics related to cross-cultural adjustment. In addition, numerous studies suggest that both openness and sociability are considered enduring, predisposed personality characteristics. As such, they are relatively fixed and will affect the way in which people behave in given situations, such as cross-national interactions (Buss, 1989; Caligiuri, 2000b; Costa & McCrae, 1992).

Expatriates' desire to terminate the assignment

The desire to terminate the assignment is the most basic behavioural criterion for assessing expatriate success. Success, according to this construct, occurs when an expatriate remains in the host country for the entire scheduled duration of his or her assignment and does not request or is not requested to return to his or her home country before the completion of the assignment. It is important to note that this criterion can be obscured by other intervening causes and should be evaluated carefully. In addition to organisational causes, other personal factors may affect how long they remain on the assignment (e.g. poor health). In the appropriate use of premature termination as a criterion, expatriates choose either to stay on the assignment, or decide that the assignment is too difficult and return home. Given the cross-sectional design of the study, an affective assessment of expatriates' desire to stay on the assignment was utilised.

Study aims

The aims of this study were to assess the relationships between expatriates' personality dispositions, locus of control, expatriates' cross-cultural adjustment and their desire to terminate the assignment.

METHOD

Research design

A survey design was used for the purposes of this study. The specific design was a cross-sectional design, by means of which a sample is drawn from a population at one time (Shaughnessy & Zechmeister, 1997).

Participants

The study population consisted of 95 expatriates from eight multinational companies in South Africa. Questionnaires were sent to all expatriates from the eight multinational companies based in South Africa who have been on the international assignment for a period of longer than three months. These expatriates were from 21 different countries (Australia, Canada, Dubai, Germany, Guinea, Hong Kong, Isle of Man, Iran, Mali, Malawi, Malaysia, Mozambique, the Netherlands, Scotland, Singapore, Tanzania, United Kingdom, United States of America, Venezuela, Zambia, Zimbabwe); 42% were from countries in Africa. Of this sample 78,9% expatriates reported that they were married, 15,8% were single and 5,3% divorced. 87% were male and 8% female.

Instruments

Four questionnaires were used in this research, namely the NEO Personality Inventory Revised (NEO-PI-R), Work Locus of Control Scale (WLCS), Cross-cultural Adjustment Scale (CCAS) and expatriates' desire to terminate the assignment Scale (TAS).

The *NEO Personality Inventory Revised (NEO-PI-R)* measures the personality of participants based on the five-factor model of personality (Costa & McCrae, 1992). The internal

consistency of the domains varies from 0,86 for Agreeableness to 0,92 for Neuroticism, while the internal consistency for the facets varies from 0,56 for Tender-Mindedness and 0,18 for Depression (Costa & McCrae, 1992). Costa and McCrae (1985) found that, when factor-analysed, the five familiar factors emerged as expected, and these results provided strong evidence of the convergent and discriminant validity of the NEO PI-R (McCrae, 1990).

The *Work Locus of Control Scale* (WLCS) measures participants' locus of control within the work environment (Spector, 1988). The WLCS consists of 16 items. The WCLS consists of two dimensions, namely External Locus of Control (e.g. "Getting the job you want is mostly a matter of luck") and Internal Locus of Control ("A job is what you make of it"). Spector (1988) reported Cronbach alpha coefficients for the WLCS varying between 0,75 and 0,85. Maram and Miller (1998) and Spector (1988) reported evidence of the construct validity of the WLCS. Spector (1988) argued that the WLCS predicts work behaviour more precisely than general scales, which measure locus of control. Rothmann and Van Rensburg (2001) reported an alpha coefficient of 0,70 for the WLCS. In research done on the WLCS in the context of expatriates, Van der Bank and Rothmann (2003) reported evidence of the internal consistency and construct validity of the WLCS for the expatriates. They found an alpha coefficient of 0,82 for the WLCS.

In the *Cross-cultural Adjustment Scale* (CCAS), expatriates rated their cross-cultural adjustment on a 5-item scale. Each item was rated on a five-point scale varying from 1 (*not at all*) to 5 (*to a great extent*). Sample items include (1) "Rate your adjustment to your current living conditions" and "Rate your adjustment to living in the country in general" A high score indicated greater cross-cultural adjustment. Caligiuri et al. (2001) reported an alpha coefficient of 0,83 for a similar cross-cultural adjustment scale.

The *Desire to Terminate the Assignment Scale* (TAS) refers to an expatriate's requesting or being requested to return to his or her home country before the assignment is completed, and is measured by three items. Sample items include (1) "Would you like to terminate this expatriate assignment early?" and "If this assignment had no effect on your career or your spouse's career, would you terminate this assignment now?" The expatriates' responses were measured on a 4-point Likert scale varying from 1 (*definitely no*) to 4 (*definitely yes*). Caligiuri (2000a) reported an alpha coefficient of 0,82 for a similar questionnaire. This is an

affective criterion (desire to remain or to leave) rather than a behavioural one (actually remaining or actually leaving prematurely).

Statistical analysis

The statistical analysis was carried out with the help of the SPSS program (SPSS Inc., 2003). First, descriptive statistics were used to explore the data. Exploratory factor analyses and Cronbach alpha coefficients were then computed to assess the validity and reliability of the constructs which were measured in this study. Firstly, a simple principal component analysis was conducted on the constructs which form part of the measurement model. The eigenvalues and scree plot were studied to determine the number of factors. In the second step either a principal factor analysis with a direct Oblimin rotation was conducted if factors were related, or a principal component analysis with a Varimax rotation was used if the factors obtained were not related (Tabachnick & Fidell, 2001). The researcher's theoretical model was tested in regression analyses.

T-tests and one-way analysis of variance (ANOVA) were used to determine differences between the sub-groups in the sample. Effect sizes (d) were calculated to assess the practical significance of results (Steyn, 1999). A cut-off point of 0,50 (medium effect (Cohen, 1988)) was set for the practical significance of differences between means.

Pearson product-moment correlation coefficients were used to specify the relationships between the variables. In the case where the distribution of scores was skew, Spearman correlation coefficients were computed. A cut-off point of 0,30 (medium effect, Cohen, 1988) was set for the practical significance of correlation coefficients.

RESULTS

Construct validity of the measuring instruments

NEO Personality Inventory Revised (NEO-PI-R). The first order factor analysis on the NEO-PI-R indicated low factor loadings on the following items, which were discarded from subsequent analysis: 7 Gregariousness (E2), 105 Dutifulness (C3), 106 Self-Consciousness

(N4), 81 Impulsiveness (N5), 52 Excitement-Seeking (E5), 114 Modesty (A5), 88 Values (O6), 59 Tender-Mindedness (A6). Next, a second-order factor analysis was done.

Principal component analysis that was carried out on the first-order factors of the NEO-PI-R showed that five factors explained 62,21% of the variance in the data. The Scree plot confirmed the selection of five factors. The results of a principal factor analysis with a varimax rotation showed that Factor 1 (labelled *Neuroticism*), included the following facets: Anxiety (loading = 0,82), Angry Hostility (0,61), Depression (0,82), Self-Consciousness (0,72), Impulsiveness (0,66) and Vulnerability (0,72). Factor 2 (labelled *Extraversion*), included the following facets: Warmth (0,83), Gregariousness (0,62), Assertiveness (0,34), Activity (0,52), Excitement-Seeking (0,82) and Positive Emotions (0,80). Factor 3 (labelled *Openness*), included the following facets: Fantasy (0,22), Aesthetics (O2), Feelings (O3), Actions (0,59), Ideas (0,37) and Values (0,70). Factor 4, (labelled *Agreeableness*), included the following facets: Trust (0,53), Straightforwardness (0,77), Altruism (0,57), Compliance (0,80), Modesty (0,52) and Tender-Mindedness (0,47). Factor 5 (labelled, *Conscientiousness*), included the following facets: Competence (0,48), Order, (0,77), Dutifulness (0,76), Achievement Striving (0,83), Self-Discipline (0,79) and Deliberation (0,55).

Locus of control (WLOC). Principal component analysis of the locus of control data indicated that the first factor explained 64% of the variance in the data. The second factor explained 20% of the variance in the data. This was confirmed by the scree plot. Table 1 shows the factor loadings, percentage variance and covariance for principal factors extraction and oblique rotation on Locus of Control items.

Table 1

Factor Loadings for Principal Component Extraction and Oblique Rotation on Locus of Control Items

Item		F ₁	F ₂
1	A job is what you make of it.	-0,08	0,75
2	On most jobs, people can pretty much accomplish whatever they set out to accomplish.	-0,03	0,64
3	If you know what you want out of a job, you can find a job that gives it to you.	-0,02	0,54
4	If employees are unhappy with decisions made by their boss, they should do something about it.	0,03	0,57
5	Getting the job you want is mostly a matter of luck.	0,60	0,12
6	Making money is primarily a matter of good fortune.	0,62	0,02
7	Most people are capable of doing their jobs well if they make the effort.	-0,06	0,66
8	In order to get a really good job you need to have family members or friends in high places.	0,65	0,02
9	Promotions are usually a matter of good fortune.	0,70	-0,10
10	When it comes to getting a really good job, who you know is more important than what you know.	0,75	-0,03
11	Promotions are given to employees who perform well in their jobs.	-0,35	0,35
12	To make a lot of money you have to know the right people.	0,69	0,17
13	It takes a lot of luck to be an outstanding employee on most jobs.	0,58	-0,32
14	People who perform their jobs well generally get rewarded for it.	-0,23	0,28
15	Most employees have more influence on their supervisors than they think they do.	0,18	0,43
16	The main difference between people who make a lot of money and people who make a little money is luck.	0,65	-0,11

Cross-cultural Adjustment (CCAS). In order to test whether the data of the questionnaire were factorable the Kaiser-Meyer-Olkin Measure of Sampling Adequacy and Bartlett's Test of Sphericity were studied. The results showed that the data were in fact factorable, with an average of 0,67, which is more than the cut-off point of 0,6. This was also statistically significant. The items were also found to be factorable, with Item 1 (0,64), Item 2 (0,64), Item 3 (0,66) and Item 4 (0,79) all $r > 0,6$. Thus all items were included in the principal component analysis. Principal component analysis of the cross-cultural adjustment data indicated that one factor explained 57,1 % of the variance in the data. All four items showed significant loadings in the factor analysis: Item 1 (*Rate your adjustment to your current living conditions*) = 0,76; Item 2 (*Rate your adjustment to living in the country, in general*) = 0,85; Item 3 (*Rate your expatriate experience thus far*) = 0,68; Item 4 (*Rate your adjustment to the entertainment and leisure opportunities in this country*) = 0,73.

Termination of assignment (TAS). In order to test whether the data of the questionnaire were factorable the Kaiser-Meyer-Olkin Measure of Sampling Adequacy and Bartlett's Test of Sphericity were studied. The results showed that the data were in fact factorable with an

average of 0,69, which is more than the cut-off point of 0,60. This was also statistically significant. Every item was also found to be factorable with Item 1 (0,67), Item 2 (0,78) and Item 3 (0,65) all $r > 0,6$. Thus all items were included for factor analysis. Principal component analysis of the Termination of Assignment data indicated that one factor explained 71,33 % of the variance in the data. All three items showed significant loadings in the factor analysis: Item 1 (*Would you terminate this expatriate assignment early?*) = 0,86; Item 2 (*If this assignment had no effect on your career or your spouse's career, would you terminate this assignment now?*) = 0,80; Item 3 (*Do you hope that you will be asked to return home early?*) = 0,88.

Descriptive statistics and internal consistency of the scales

Table 2 shows the descriptive statistics and alpha coefficients for the extracted NEO-PI-R, WLOC, CCA and TA factors.

Table 2

Descriptive Statistics and Alpha Coefficients of the Scales

Variable	Mean	SD	Skewness	Kurtosis	α
Neuroticism	20,71	2,41	-0,45	-0,72	0,68
Extraversion	15,15	1,99	-0,18	-0,25	0,75
Openness	16,38	2,41	-0,39	0,34	0,81
Agreeableness	15,76	2,08	-0,26	0,05	0,76
Conscientiousness	13,93	2,16	0,30	0,06	0,71
Termination of assignment	5,16	2,91	1,30	1,64	0,78
Cross-cultural Adjustment	16,59	2,93	-0,81	0,63	0,74
Internal locus of Control	29,59	3,46	-1,21	3,40	0,66
External locus of Control	20,58	7,03	0,25	-0,61	0,81

Table 2 shows that acceptable Cronbach alpha coefficients ($\alpha > 0,65$) were obtained for all of the scales (see Nunnally & Bernstein, 1994). It is evident from Table 3 that most of the various measuring instruments are relatively normally distributed. The exceptions are Internal Locus of Control and Desire to terminate the assignment, which show high kurtosis. Termination of assignment and Internal Locus of Control also show high skewness. These results suggest that most expatriates did not want to terminate the assignment (positively skewed distribution) and reported an Internal Locus of Control.

Table 3 shows the descriptive statistics and alpha coefficients for the extracted NEO-PI-R factors.

Table 3

Descriptive Statistics and Alpha Coefficients of the NEO-PI-R

Variable	Mean	SD	Minimum	Maximum	Skewness	Kurtosis	r-Mean	α
N1	26,99	4,14	17,00	38,00	-0,13	0,36	0,22	0,68
E1	18,16	3,88	8,00	29,00	0,38	0,49	0,27	0,75
O1	23,02	5,53	9,00	32,00	-0,53	-0,51	0,35	0,81
A1	20,15	4,42	11,00	34,00	0,60	0,45	0,31	0,76
C1	11,83	2,49	6,00	20,00	0,09	1,24	0,33	0,71
N2	27,08	5,31	15,00	37,00	-0,57	-0,22	0,34	0,80
E2	19,87	4,41	10,00	27,00	-0,29	-0,95	0,27	0,72
O2	22,87	6,11	8,00	40,00	0,09	-0,07	0,41	0,85
A2	21,24	4,40	9,00	33,00	-0,09	0,15	0,20	0,67
C2	20,49	4,66	11,00	34,00	0,74	1,00	0,28	0,74
N3	28,02	4,23	17,00	36,00	-0,19	-0,53	0,23	0,70
E3	20,15	3,64	11,00	30,00	-0,09	-0,33	0,17	0,60
O3	19,74	4,54	8,00	29,00	-0,16	-0,27	0,27	0,75
A3	18,11	3,40	9,00	27,00	0,09	0,24	0,24	0,70
C3	13,53	3,39	7,00	24,00	0,40	0,42	0,30	0,74
N4	23,55	3,77	12,00	32,00	-0,19	0,27	0,22	0,66
E4	19,93	4,13	10,00	30,00	-0,01	-0,07	0,22	0,68
O4	22,43	4,44	12,00	32,00	-0,21	-0,51	0,23	0,71
A4	23,45	4,92	14,00	34,00	-0,00	-1,10	0,27	0,75
C4	18,08	4,06	8,00	28,00	0,20	0,07	0,30	0,75
N5	21,76	4,02	12,00	29,00	-0,41	-0,70	0,24	0,69
E5	18,23	3,77	11,00	29,00	0,34	-0,26	0,18	0,60
O5	19,47	4,88	8,00	32,00	-0,04	-0,03	0,31	0,78
A5	20,43	3,31	11,00	29,00	0,03	-0,10	0,11	0,48
C5	19,40	3,51	13,00	29,00	0,66	0,22	0,16	0,64
N6	31,78	3,26	24,00	39,00	-0,38	0,28	0,22	0,68
E6	19,39	4,31	10,00	30,00	0,55	0,08	0,27	0,74
O6	16,65	2,50	11,00	22,00	-0,45	-0,04	0,06	0,12
A6	17,33	3,41	9,00	26,00	0,16	0,39	0,19	0,58
C6	22,25	4,04	15,00	32,00	0,42	-0,51	0,20	0,67
NEO_N	20,71	2,41	14,68	25,86	-0,45	-0,07	0,47	0,83
NEO_E	15,15	1,99	9,70	19,88	-0,18	-0,25	0,27	0,69
NEO_O	16,38	2,41	10,09	22,14	-0,39	0,34	0,42	0,82
NEO_A	15,76	2,08	9,63	20,48	-0,26	0,04	0,33	0,75
NEO_C	13,93	2,16	8,89	19,15	0,30	0,06	0,45	0,83

NEO_N = Neuroticism; NEO_E = Extroversion; NEO_O = Openness; NEO_A = Agreeableness; NEO_C = Conscientiousness

Table 3 shows that acceptable Cronbach alpha coefficients ($\alpha > 0.65$) were obtained for all of the scales (see Nunnally & Bernstein, 1994) except Values (O6), Modesty (A5) and Tender-Mindedness (A6). The mean inter-item correlations of all the scales, except Values (O6) and Modesty (A5), are also acceptable ($0,15 \leq r \leq 0,50$, Clark & Watson, 1995). It is evident from Table 4 that most of the various measuring instruments are relatively normally distributed, with low skewness and kurtosis. For the facets of Competence (C1), Order (C2) and Compliance (A4) a slight deviation from 0 was reported, which is an indication of a skewly distributed population. These results support the internal consistency of the scales of the NEO-PI-R for the expatriates.

Based on the fact that the TAS scores were extremely skewly distributed, two groups were created based on the scores. Group one consisted of individuals who did not want to terminate the assignment (scores below the 50th percentile). Group 2 consisted of individuals who did want to terminate the assignment (total scores above the 50th percentile). Independent T-tests for independent samples were carried out on all the personality variables of the NEO-PI-R, locus of control as measured by WLOC and cross-cultural adjustment as measured by the CCAS. Table 4 indicates results of t-tests for TAS, NEO-PI-R, WLOC AND CCAS.

Table 4
T-Test Results

Item	Low TAS		High TAS		<i>t</i>	<i>p</i>	<i>d</i>
	Mean	<i>SD</i>	Mean	<i>SD</i>			
Neuroticism	20,84	2,25	20,31	2,94	0,81	0,42	0,18
Extraversion	14,95	1,92	15,94	1,92	-2,18	0,04*	0,52+
Openness	16,31	2,39	17,03	2,02	-1,42	0,16	0,30
Agreeableness	15,72	1,87	16,21	2,31	-0,92	0,36	0,21
Conscientiousness	13,72	2,07	14,46	2,25	-1,23	0,23	0,33
Warmth	17,87	3,83	19,75	3,33	-2,28	0,03*	0,49
Trust	19,75	4,15	21,96	4,68	-2,05	0,05	0,48
Assertiveness	19,61	3,67	21,63	3,33	-2,47	0,02*	0,55+
Dutifulness	12,96	2,99	15,04	3,70	-2,49	0,02*	0,56+
Cross-cultural Adjustment	16,09	2,53	13,87	3,41	2,92	0,01*	0,65+

• Statistically significant ($p < 0,05$)

+ Practically significant – medium effect ($d > 0,50$)

++Practically significant – large effect ($d > 0,80$)

The results in Table 4 indicate that expatriates measuring high on termination of the assignment differed statistically significantly from those who did not want to in regard to Extraversion, Assertiveness, Dutifulness and Cross-cultural Adjustment. These differences were practically significant (medium effect). The results showed that expatriates who scored higher on Extraversion, Assertiveness, Dutifulness and lower on Cross-cultural adjustment considered terminating the assignment.

Correlations of the scales

In this study, Pearson's product-moment coefficient of correlation (r) was used to determine the linear relationship between the variables of the various measuring instruments. Spearman correlation (ρ) was used when skewness of the variables was higher than 1. The correlation coefficients between the COPE, WLCS, Expatriates' desire to terminate the assignment (TA) and their cross-cultural adjustment (CCA) are reported in Table 5.

Table 5

Product-moment Correlation Coefficients between the Measuring Instruments

Item	1	2	3	4	5	6	7	8
1. Neuroticism	-	-	-	-	-	-	-	-
2. Extraversion	-0,15	-	-	-	-	-	-	-
3. Openness	0,15	0,54++	-	-	-	-	-	-
4. Agreeableness	-0,15	0,12	0,31+	-	-	-	-	-
5. Conscientiousness	-0,29*	0,17	-0,21+	-0,03	-	-	-	-
6. Termination of Assignment	-0,02	0,24*	0,02	-0,06	-0,01	-	-	-
7. Internal Locus of Control	0,13	-0,11	-0,12	-0,02	-0,21*	0,04	-	-
8. External Locus of Control	-0,17	0,14	0,00	0,15	0,12	0,04	-0,22*	-
9. Cross-cultural Adjustment	-0,03	-0,19	-0,23+	-0,08	-0,12	-0,38+	0,09	0,04

* Statistically significant correlation: $p \leq 0,05$

+ Practically significant correlation (medium effect): $r \geq 0,30$

++ Practically significant ant correlation (large effect): $r \geq 0,50$

Table 5 shows the following significant correlation coefficients between locus of control, personality dimensions, expatriates' desire to terminate the assignment and their cross-cultural adjustment: A negative correlation is indicated between External Locus of Control

and Depression and a positive correlation with Trust. A negative correlation is indicated between Cross-cultural Adjustment and Openness, in particular the facets Fantasy, Ideas and Trust, which are a facet of Agreeableness. A positive correlation is indicated between Termination of the Assignment and Extraversion, in particular the facet Assertiveness and a negative correlation between Termination of the Assignment and Cross-cultural Adjustment.

Multiple regression analyses

The results of a multiple regression analysis with personality dispositions (as measured by the NEO-PI-R) as independent variables and the Cross-cultural Adjustment of expatriates (as measured by the CCAS) as dependent variable are shown in Table 6.

Table 6

Regression Analysis with Cross-cultural Adjustment as Dependent Variable

		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	Constant	19,31	1,24		15,60	0,000	9,54	0,31	0,09	0,093
	Fantasy (O1)	-0,16	0,05	-0,31	-3,09	0,003				
2	(Constant)	19,81	1,36		14,62	0,000	5,18	0,32	0,10	0,008
	Fantasy (O1)	-0,13	0,07	-0,24	-1,95	0,054				
	Ideas (O5)	-0,07	0,07	-0,11	-0,92	0,360				
3	(Constant)	21,08	1,65		12,76	0,000	4,07	0,34	0,12	0,017
	Fantasy (O1)	-0,12	0,07	-0,23	-1,92	0,058				
	Ideas (O5)	-0,04	0,08	-0,07	-0,52	0,605				
	Agreeableness (A1)	-0,09	0,07	-0,14	-1,33	0,188				

Table 6 shows that 12% of the variance in cross-cultural adjustment of expatriates is predicted by the personality traits of Fantasy (9%), Ideas (10%) and Trust (12%) ($F = 4,07, p < 0,01$). Adding these three variables to the prediction statistically increased the R^2 , with the highest increases when Fantasy ($\Delta R^2 = 0,093$), Ideas ($\Delta R^2 = 0,008$) and Trust ($\Delta R^2 = 0,017$) were entered into the multiple regression analysis. It seems that low fantasy as personality disposition is the best predictor of expatriates' cross-cultural adjustment.

The results of a multiple regression analysis with personality dispositions (as measured by the NEO-PI-R) as independent variables and expatriates' desire to terminate the assignment (as measured by the TAS) as dependent variable are shown in Table 7.

Table 7

Regression Analysis with Termination of the Assignment as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	(Constant)	10,34	1,54		6,72	0,000	11,72	0,34	0,11	0,112
	Cross-cultural Adjustment	-0,33	0,10	-0,34	-3,42	0,001				
2	(Constant)	6,23	2,17		2,87	0,005	9,64	0,42	0,17	0,061
	Cross-cultural Adjustment	-0,32	0,09	-0,33	-3,45	0,001				
	Assertiveness (E3)	0,20	0,08	0,25	2,61	0,010				

Table 7 shows that 17% of the variance in expatriates' desire to terminate the assignment is predicted by expatriates' cross-cultural adjustment and the personality trait of Assertiveness ($F = 9,64, p < 0,01$). Adding these two variables to the prediction statistically increased the R^2 , with the highest increases when Cross-cultural adjustment ($\Delta R^2 = 0,112$) and Assertiveness ($\Delta R^2 = 0,061$) were entered into the multiple regression analysis. It seems that expatriates' cross-cultural adjustment and the personality trait of Assertiveness explains approximately 17% of the variance in expatriates' desire to terminate the assignment.

DISCUSSION

The aims of this study were to assess the relationships between expatriates' personality dispositions, locus of control, their cross-cultural adjustment and their desire to terminate the assignment.

Results showed that a negative correlation exists between termination of the assignment and cross-cultural adjustment. Thus expatriates who do not adjust cross-culturally will terminate the assignment. This finding confirms the results of previous studies (Black, 1988; Caligiuri, 1997; Tung, 1981) in that cross-cultural adjustment is negatively related to premature termination of the assignment. The results also showed a positive correlation between Termination of the Assignment and Assertiveness, supporting findings from Caligiuri (2000a) in that extraversion is a significant predictor of the expatriates' desire to terminate an assignment.

The results of t-tests gave some direction in identifying expatriates who will terminate the assignment in that expatriates who measure high on Extraversion, who are assertive and

dutiful and who do not adjust cross-culturally will indicate a desire to terminate the international assignment. The multiple regression analysis showed that expatriates who do not adjust cross-culturally and who are assertive will terminate the assignment. The significance of the finding lies also in the converse in that expatriates who do not adjust cross-culturally and who measure low on Extraversion, who are not assertive and measure low on Dutifulness will not indicate that they want to terminate the assignment. Thus evidence was found in this research for the preliminary finding of Black, Gregersen and Mendenhall (1992) and Caligiuri (1997), suggesting that cross-cultural adjustment is a predictor of self-reported success in expatriate assignments.

Relationships were found between cross-cultural adjustment and the Big Five personality dimensions. Openness and the facets of Fantasy, Ideas (facets of openness) and Trust (facet of agreeableness) correlated negatively with expatriates' cross-cultural adjustment. The results do not confirm findings of Abe and Wiseman (1983) and Black (1990) that expatriates' being open to experience is related to expatriate adjustment. The reason may be that the results are a reflection of the fact that 42% of the sample represented expatriates from countries in Africa. The researcher is also in agreement with various researchers (Caligiuri, 2000b; Ones & Viswesvaran, 1999) that personality is one predictor of expatriates' cross-cultural adjustment and that factors such as perceptions of host ethnocentrism (Florkowski & Fogel, 1999), perceived organisational support upon repatriation (Selmer, 1998), expatriate mentoring (Feldman & Bolino, 1999) and family adjustment (Caligiuri et al., 1998) play an important part in predicting expatriate adjustment.

The results showed that emotional stability and the tendency to trust others correlated positively with expatriates with an External Locus of Control, and support was found for conscientiousness and its relationship with locus of control (Zellars et al., 2000). The skew distribution regarding locus of control (which caused a restriction of range) may explain the absence of significant relationships in this study.

Results from the multiple regression analyses showed that low fantasy as a personality facet was the best predictor of expatriates' cross-cultural adjustment. This may be explained in the context of the culture shock that expatriates experience when they first confront or come into contact with a different culture. According to Furnham and Bochner (1986), realistic expectations about all aspects of expatriates' new life are directly correlated to their

adaptation and happiness. Thus, the more congruent expatriates' expectations are with reality once on the assignment, the greater the expatriate's adjustment and the more the expatriate fantasize the realities of expatriation the greater the culture shock.

The present study has certain limitations. The sample size was one limitation of this study. This study was conducted with eight South African-based multinational organisations in various industries. Although the expatriates from these organisations seemed in many respects typical of expatriates in many South African companies (e.g. age, length of stay, marital status, gender), future studies should attempt to sample a broader variety and a larger number of organisations to improve both sample size and generalisability. Because the sample sizes were too small in any specific country to do country analyses, future studies should test the proposed universality of personality characteristics as predictors of expatriate success. Although large diverse sample sizes are both desirable and encouraged, it is quite challenging to gain access to several expatriates in any one company, given the low response rate. Future studies should attempt to sample a broader variety and a larger number of organisations to improve both sample size and generalisability.

A few considerations should be kept in mind with respect to the way in which the criterion variables were measured. First, this study assessed expatriates' desire to terminate the assignment, i.e. the desire to terminate the assignment as an affective response instead of the expatriates' actual behaviour of either terminating or completing their assignments. Future studies should examine actual behaviours to remain in, or terminate, global assignments. Secondly, this study implemented two dimensions, desire to terminate the assignment and cross-cultural adjustment, rather than three dimensions, cross-cultural adjustment, performance and desire to terminate the assignment, as suggested by Black and his colleagues (e.g. Black, 1988, 1990; Black & Stephens, 1989). Correctly identifying criteria in expatriate research will aid in theory-building in this area. Future studies of expatriates should more carefully select a criterion based on the theory to be tested by their research. Models predicting these criteria should be considered separately, or interrelated, but not as if they were one and the same.

Given that global assignments, by their very nature, affect the family as a whole and not just the employee on the assignment (Guzzo, Noonan & Elron, 1994), it is recommended that the influence of the spouse and family of an expatriate should be taken into account in future

studies. Past research suggests that geographic relocations cause a tremendous disruption in the lives of all family members (Guzzo, et al., 1994). To date, the effect of family adjustment on the expatriates' success has focused primarily on the expatriates' cross-cultural adjustment as predictors of premature return from the assignment (Black & Gregersen, 1991; Black & Stephens, 1989; Fukuda & Chu, 1994; Schneider & Asakawa, 1995; Sparrow, 1999).

The lack of clarity about what constitutes "cross-cultural adjustment" and how it changes over time may be a limitation of this study. Numerous variables have been utilised as indices of adjustment: acceptance of the host culture, satisfaction, feeling of acceptance and acquisition of culturally appropriate behaviour and skills. However, the construct has implicitly incorporated both a psychological dimension (feelings of well-being and satisfaction) and a sociocultural component (ability to fit in), and negative interactive aspects of the new culture. It then becomes imperative to differentiate between psychological and sociocultural dimensions in the prediction of adjustment and in the measurement of cross-cultural adjustment.

On the predictor side, this study has adopted the broad perspective for assessing personality characteristics. There is some controversy over whether or not this is the best perspective, and whether the broad perspective undermines specificity on the predictor side (Ones & Visweswaran, 1999). Evidence for this hypothesis was found with regard to psychological strengths as added dimensions to emotional stability and could be generalised to the other four dimensions of the Big Five. Lastly, the study used a cross-sectional design to study the relationships between personality dispositions and adjustment of expatriates. Causal relationships cannot really be deduced with this design. A longitudinal or experimental design is essential to determine causal relationships.

RECOMMENDATIONS

Given the extraordinarily high financial, relational and emotional costs for expatriates, their families and their organisation, understanding who will benefit most from being on a foreign assignment is important. In a practical sense, a question answered in this study was whether personality characteristics could be used to predict success in overseas assignments. Based on this study, the personality characteristics of extraversion and openness to experience can be recommended for use in expatriate selection systems. It is recommended that extraversion,

openness to experience, agreeableness, conscientiousness and locus of control are considered to predict success in overseas assignments. In addition it is recommended that companies measure expatriate success not just in terms of the completion of the international assignment, but also to measure expatriates' performance as well as their cross-cultural adaptation.

From a theoretical and research perspective it becomes imperative that future studies differentiate between the psychological and socio-cultural dimensions of cross-cultural adjustment. Although these notions are conceptually interrelated, they refer to different phenomena. In addition, it is recommended that future studies use large samples as large sample sizes might provide increase confidence that study findings would be consistent across other similar groups. Future studies should include country analyses if the sample size allows it in order to test universality of personality characteristics as predictors of expatriate success. It is also recommended that future studies implement three dimensions in measuring expatriates' success. They are performance, the desire to terminate the assignment and cross-cultural adjustment. This study used a cross-sectional design to study the relationships between personality dispositions, coping and adjustment of expatriates. Thus, causal relationships cannot really be deduced with this design. It is recommended that future research use a longitudinal or experimental design in order to determine causal relationships.

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CHAPTER 4

RESEARCH ARTICLE 3

PREDICTORS OF EXPATRIATES' SUCCESS

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ABSTRACT

The objective of this study was to assess whether expatriates' success in their international assignment as determined by their cross-cultural adjustment, performance and desire to terminate the assignment could be predicted based on demographic variables, stress and personality dispositions. A convenient sample ($N = 95$) was taken of expatriates of various multinational companies. The Neo-Personality Inventory Revised, Expatriate Stress Inventory, a biographical questionnaire, which included expatriates' motivation for accepting the assignment, expatriates' cross-cultural adjustment, their desire to terminate the assignment and their performance were administered. The results showed that Cultural stress explained 17% of the variance in expatriates' cross-cultural adjustment. Assertiveness and cross-cultural adjustment explained 28% of expatriates' desire to terminate the assignment.

OPSOMMING

Die doelstelling van hierdie studie was om vas te stel of geëkspatrieerdes se sukses in hul internasionale opdrag soos bepaal deur hulle kruiskulturele aanpassing, hul prestasie asook hul wens om die opdrag te beëindig op grond van demografiese veranderlikes, stres en persoonlikheidsdimensies voorspel kan word. 'n Dwarsdeursnee-ontwerp is gebruik. 'n Gerieflikheidsteekproef ($N = 95$) is geneem van geëkspatrieerdes in verskeie multinasionale maatskappye. Die Neo-Personality Inventory Revised, Expatriate Stress Inventory, 'n biografiese vraelys, wat geëkspatrieerdes se motivering om die opdrag te aanvaar, die kruiskulturele aanpassing van geëkspatrieerdes, hul wens om die internasionale opdrag te beëindig asook selfbeoordeling van hulle prestasie insluit, is as meetinstrumente gebruik. Die resultate het getoon dat kultuurstres 17% van die variansie in die kruiskulturele aanpassing van geëkspatrieerdes voorspel. Selfgelding en kruiskulturele aanpassing het 28% van die variansie in geëkspatrieerdes se wens om die internasionale opdrag te beëindig, verklaar.

The increase in globalisation has led to more employees being sent on international assignments than ever before, with every indication that the use of expatriates will continue to expand into the 21st century (Dolanski, 1997; Dolins, 1999). Thus, for many organisations in South African and worldwide, sending expatriates abroad for one or more years to develop global competencies is consistent with their overall strategic human resource plan. In addition to professional development for gaining global competency and as a means of fostering the parent corporate culture, multinational companies place domestic employees in key leadership positions abroad (Tung, 1982). Thus, successful expatriate assignments are indispensable to multinational companies for both developmental and functional reasons (Black et al., 1991; Dowling et al., 1998; Strohl & Caligiuri, 1998; Tung & Miller, 1990).

Given the strategic importance multinational companies attach to global assignments the harm an unsuccessful expatriate may cause in the host country can be detrimental to the multinational company's future global business (Aycan & Kanungo, 1997; Gregersen & Black, 1990; Tung, 1998). Forster (1997) specifically highlighted several possible implications of poor expatriate cross-cultural adjustment, including inadequate performance, psychological stress, negative effects on the expatriates' families and the long-term career repercussions upon repatriation of failed expatriate assignments. In order to advance the research on expatriate adjustment, the relationship between cross-cultural adjustment, expatriate performance, desire to terminate the assignment and several antecedents of expatriate adjustment were examined.

Criteria of expatriate success

Since global assignments are becoming more important for both individuals' careers and organisations' global success, having a systematic means to measure expatriate performance, likewise, is increasing in importance. Past research indicates considerable variation in the types of criteria used in evaluating how successful expatriate assignments have been. To date, the three most common criteria for evaluating expatriate success have been: (1) completion of the foreign assignment, (2) cross-cultural adjustment and (3) performance on the foreign assignment. These two factors, performance and completion of the global assignment, are both imperative for multinational companies' better understanding of the factors impacting on the cross-cultural adjustment of expatriates, and ultimately the success of the expatriate assignment. However, it is important to include the study of cross-cultural adjustment

because various researchers agree that the success of a global assignment is greatly influenced by an expatriate's cross-cultural adjustment to the host country (Black & Mendelhall, 1990; Kealey & Protheroe, 1996).

Psychological adjustment deals with subjective well-being, while sociocultural adjustment relates to culture-specific skills, the ability to negotiate the host culture, or general intercultural competence as measured by the amount of difficulty experience in the management of everyday situations in the host culture (Ward & Chang, 1997; Ward & Kennedy, 1996). According to Searle and Ward (1993), psychological adjustment can best be understood within a framework of stress with depression predicted by life changes, extraversion, satisfaction with relationships with host nationals and social difficulty. Within a stress framework, it can be expected that personality variables and social support may mediate adaptation to a foreign milieu. In addition, Church (1982) suggests that the interaction of personality and situational variables will be more fruitful in the prediction of cross-cultural adjustment. Tung's (1981) seminal article examining the reasons for expatriate premature termination found that spouses' and expatriates' inability to adjust to living in the host country were the most frequently cited reasons for the failure of international assignments. This study also suggested that cross-cultural adjustment is important to the outcome of the assignment.

The premature termination of a global assignment is especially problematic given the high cost of relocating employees overseas (Caligiuri et al., 1998). Although cross-cultural maladjustment is one predictor of expatriates' prematurely terminating their global assignments, in respect of using it as a criterion it is important to note that not all maladjusted expatriates terminate their cross-cultural assignments. Some, despite their inability to adjust to the host cultures, remain abroad. They are usually motivated to put forth a positive impression to the parent organisation (Caligiuri, Phillips, Lazarova, Tarique & Bürgi, 2001). That said, given past research findings by the same authors as well as Van der Bank and Rothmann (in press), evidence was found for the association between expatriates' cross-cultural adjustment and their desire to terminate the assignment.

Pragmatically, multinational organisations would want their employees to both remain on their international assignment and be cross-culturally adjusted while they are there. Above and beyond these two criteria, however, multinational organisations would want their

expatriates to perform their work assignments successfully while they are abroad. Unfortunately, there are very few sound empirical studies of expatriates where an assessment of job performance is used as the criterion. The reason may be the difficulty in accessing the data, especially with relation to supervisor rated performance.

For those expatriates who do return from their assignments prematurely, studies have found that spouses' inability and the expatriates' inability to adjust to living in the host country were the two most frequently cited reasons for the failure (Handler, 1995). Therefore, an expatriate's entire family (spouse and children) may have an impact on the outcome of his/her global assignment (Forster, 1992; Handler, 1995; <http://www.windhamworld.com>). Consequently, the success of the global assignment is not only a function of the expatriate himself or herself, but also a function of the expatriate's spouse and children (Caligiuri, Hyland, Joshi & Bross, 1998).

The aims of this study was to examine how personality characteristics (the Big Five personality characteristics), stressors of expatriation, expatriates' motivation and biographical data relate to their cross-cultural adjustment, performance and desire to terminate the assignment.

A model of expatriate success

This study offers a model to describe expatriate success as measured by their cross-cultural adjustment to an international assignment, their performance and their desire to terminate the assignment. The model (see Figure 1) includes three predictive components affecting cross-cultural adjustment. The first includes the factors affecting the characteristics of the situation and the perception thereof. These situational factors include stress, more specifically organisational stress and cultural stress. The second component includes variables such as personality traits, company support, social support and language skills. The third component describes the appraisal of the situation and includes cross-cultural shock.

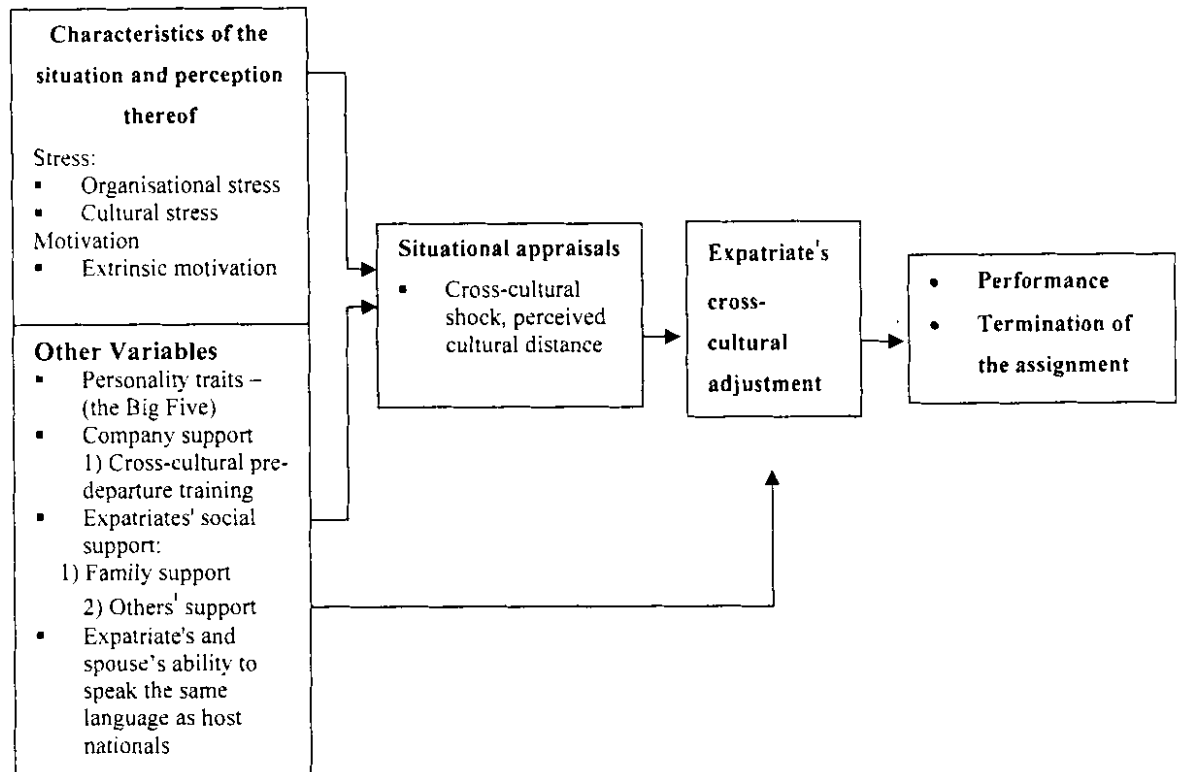


Figure 1. Model of the expatriate's adjustment

When formulating the proposed predictors of adjustment to the expatriates' assignment into an overall model, a number of interrelationships among the variables can be proposed. It can be proposed that the characteristics of the situation and the person's subjective evaluation of the relevance of the situation to his or her well-being and other variables such as personality traits, company support, social support and language skills available should have indirect effects on adjustment (see Figure 1). Thus, this model proposed that the characteristics of the situation and perception thereof as well as other variables are key mediating variables in the stress-adjustment relationship.

Second, it can be proposed that other variables and characteristics of the situation and perception thereof will have indirect effects (through the person's subjective evaluation of the relevance of the situation to his or her well-being) and direct effects on the individual's cross-cultural adjustment. According to the proposed model of expatriates' adjustment the third major prediction is that the other variables of expatriates will influence their level of adjustment to stress. Personality traits as variables are relatively stable characteristics of

expatriates' dispositions and environments, and refer to what is available to them for their cross-cultural adjustment.

Factors associated with successful expatriation

Although it is beyond the scope of this article to present a comprehensive review of all the factors associated with successful expatriation, several factors can be summarised as conceptualised in the proposed model of expatriate success.

Figure 1 proposes four possible variables affecting expatriates cross-cultural adjustment. These variables include: (a) the expatriates' personality characteristics, (b) company support (c) social support (family and others) and (d) situational constraints affecting relationship building.

a) Personality characteristics and cross-cultural adjustment. As previously discussed, cross-cultural adjustment is the extent to which individuals are psychologically comfortable living outside their home country (Black & Gregersen, 1991). Those expatriates who are expected to adjust well in overseas postings have been suggested to have certain personality characteristics. Van der Bank and Rothmann (in press) found evidence for Openness and specifically the facets Fantasy, Ideas (facets of openness) and Trust (facet of agreeableness) as predictors of expatriates' cross-cultural maladjustment. According to Caligiuri (2000a, 2000b) personality characteristics relevant to social interactions are very important since they affect the quantity and quality of social interactions and consequently influence cross-cultural adjustment. However, it is important to note that expatriates will vary on these personality characteristics that are necessary for relating to others as an expatriate who has access to daily interactions with other expatriates or host nationals, yet is not open to the interactions, will have lower cross-cultural adjustment, compared to a person with greater openness (Caligiuri & Lazarova, 2002; Naughton, 1997). Thus, personality characteristics in relation to situational factors, like access to support, influence expatriates' cross-cultural adjustment.

b) Company support and cross-cultural adjustment. Problems presented as expatriation failure tend to be seen as indicators of an individual's inadequacies. In strong contrast herewith, researchers (Kraimer et al., 2001; Mendenhall & Oddou, 1985) have indicated that such problems should, in fact, be viewed as consequences of company management practices,

which can be changed. In conjunction with careful selection of expatriates, comprehensive pre-departure training and support provided by the multinational company are associated with successful expatriation (Kealey & Potheroe, 1996; Porter & Tansky, 1999). De Cieri et al. (1991) found that company assistance was one of the most consistent and strong predictors of expatriates' adjustment to relocation. Also, the negative relationship between company assistance and culture shock suggests that company assistance helps expatriates prepare for and cope better with the stress associated with relocation. De Cieri (1991) and Harvey (1985) are of the opinion that comprehensive company assistance cannot be viewed as a luxury, but is rather an integral and necessary component of successful international assignments.

c) Social support. The initial stages of most expatriate assignments are often associated with stress. Support by family and others can provide expatriates with the emotional support that helps them overcome the negative feelings and experiences that are a natural part of the cross-cultural transition (Shinn et al., 1984; Shumaker & Bronwell, 1984). This social support may reduce stress and provide referent groups, through which the new environment can be interpreted.

Family. Family support can help expatriates mobilise their psychological resources to deal with emotional problems and raise their confidence that they can successfully manage the cross-cultural transition (Caligiuri et al., 1998). Many researchers (Arthur & Bennet, 1995; De Cieri et al., 1991; Dennis & Stroh, 1999) claim that the expatriate's failure is most frequently due to their families' poor adjustment.

Others. The more the expatriates are supported by host nationals, the more likely they will be to learn culturally appropriate norms and behaviours (Black et al., 1991; Briody & Chrisman, 1991; McEvoy & Parker, 1995; Parker & McEvoy, 1993). Interactions may also increase the expatriate's psychological well-being, given that the more interactions a person has with people from a particular culture, the more positive her attitudes will be towards people from the culture.

Expatriates' social support and social interactions with other expatriates is also important for cross-cultural adjustment (Briody & Chrisman, 1991). These interactions can provide not only a sense of affiliation and belonging but also serve as a source of information about the host environment seen through the lens of the perceptions of other expatriates, or the

"comparable others" (Caligiuri & Lazarova, 2002). These expatriates are in a position to help the cultural integration of newcomers, especially if they have already established relationships with host nationals.

d) Other constraints to relationship building. Regardless of the fact that the right affiliating personality characteristics are important in the process of developing relationships, the ability to speak to host nationals' language may either enhance or limit expatriates' and their spouses' cross-cultural adjustment. For example, knowledge of the host national language increases the opportunities for daily interactions with host nationals. These interactions may include more in-depth conversations with host nationals and more frequent conversations with neighbours, shopkeepers and the like.

Characteristics of the situation: According to the hypothesized model, the characteristics of the situation are determined by the expatriates' *motivation* for accepting the expatriate assignment and *stress* experienced on the international assignment. Thus, given that expatriate assignments create large degrees of uncertainty, theories of stress management seem particularly relevant to understanding expatriate adjustment (Black et al., 1991).

A basically unchallenged premise within stress research is that the stressful situation is an external force requiring no further explanation, in contrast to a situation that is caused by a person's actions. That is, causality is assumed to flow from stress as a stimulus to the stress reaction as an outcome. However, the merit of transactional stress theory is that it explicitly challenges this view and recognizes the contribution of a person's thoughts and behaviours to the genesis of stress (Lazarus & Folkman, 1984). The pivotal postulate of their theory is that stress is inherent neither to the environment nor to the person alone, but results from the ongoing relationship between them, which they refer to as 'transaction'. This transaction is mediated by appraisal processes that determine the outcome of the stress process. In support, Church (1982) suggested that the interaction of personality and situational variables will be more fruitful in the prediction of cross-cultural adjustment.

In this research two factors of expatriation stress were identified; organisational stress (OS) and cultural stress (CS). Organisational stress refers to stress that expatriates experience in relation to job tasks of the international assignment and cultural stress refers to stress associated with general living conditions and culture of the foreign assignment. Based on

stress management theories of psychological stress it is expected that Cross-cultural adjustment is related to performance. Within the stress research, it has been suggested that when employees are learning new organisational roles or facing stressful life events, psychological stress may lead to decreased work performance (Kraimer et al., 2001). Cohen (1980) proposed that stress may create cognitive fatigue and rob individuals of energy needed for job performance. Thus, based on stress management theories, it is expected that expatriates who feel well-adjusted to the work and general environment will be able to perform at higher levels.

Situational appraisal: Cross-cultural shock. Hays (1972) has described culture shock as primarily an emotional reaction that follows from not being able to understand, control and predict another's behaviour. Thus, culture shock is seen as a stress reaction where salient psychological and physical rewards are generally uncertain and hence difficult to control or predict. Therefore, a person is anxious, confused and apparently apathetic, until a new set of cognitive constructs is set to understand and enact in the appropriate behaviour. Many expatriates experience what is referred to as "culture shock" when they first confront or come into contact with a different culture (Zakaria, 2000). Caligiuri and Phillips (2003) indicated that the expectations created prior to an expatriate going on the global assignment would affect his or her cross-cultural adjustment. The more congruent an individual's expectations are with the individual's reality once on the assignment, the greater the expatriate's adjustment will be to the international assignment and these expectations, in turn, will affect the culture shock experiences while on the global assignment.

According to Furnham (1997), expatriates hold a variety of beliefs and assumptions about how to deal with cultural differences. There are many differences between the factual, the affective and the axiomatic approaches, and consequently frustration in dealing with individuals who favour a different approach (Hofstede, 1984). In addition, research found that not all expatriates experience the same level of anxiety, or experience anxiety for the same length of time (Church, 1982). This implies that the study of cross-cultural adjustment must be approached as an individual difference which could potentially be predicted, rather than as a fixed period of anxiety that all expatriates will necessarily experience when they enter a new culture (Black, 1990; Searle & Ward, 1993). De Cieri et al. (1991) found that culture shock and perceived cultural distance were not strong predictors of psychological

adjustment to expatriation. However, their research did not include an adequately representative sample of culturally and economically diverse countries.

Study aims

The aims of this study were to assess the relationships between expatriates' personality dispositions, their biographical factors, stress, expatriates' desire to terminate the assignment, cross-cultural adjustment and their performance.

METHOD

Research design

A cross-sectional survey design was used to achieve the research objectives whereby a sample is drawn from a population at one time (Shaughnessy & Zechmeister, 1997).

Participants

The study population consisted of 95 expatriates from eight multinational companies in South Africa. Questionnaires were sent to all expatriates from the multinational companies based in South Africa that have been on the international assignment for a period longer than three months. These expatriates were from 21 different countries (Australia, Canada, Dubai, Germany, Guinea, Hong Kong, Isle of Man, Iran, Mali, Malawi, Malaysia, Mozambique, Netherlands, Scotland, Singapore, Tanzania, United Kingdom, United States of America, Venezuela, Zambia, Zimbabwe); 42% were from countries in Africa. Of this sample 78,9% expatriates reported that they were married, 15,8% were single and 5,3% divorced. Of this sample, 48% of the expatriates reported that their national language is the same as that spoken in the host country and 45% indicated that they had previous foreign experience before accepting the international assignment. A total of 87% were male and 8% female, while 64% of the expatriates were accompanied by their family and 41% of the expatriates reported that they had received pre-departure training.

Measuring instruments

The measuring instruments used in this study included the NEO Personality Inventory Revised (NEO-PI-R), Cross-cultural Adjustment Scale (CCAS), Expatriates' Desire to Terminate the Assignment Scale (TAS), Performance Appraisal Instrument (PAI), Expatriate Stress Inventory (ESI), and a biographical questionnaire.

The *NEO Personality Inventory Revised* (NEO-PI-R) measures the personality of participants based on the five-factor model of personality (Costa & McCrae, 1992). The internal consistency of the domains varies from 0,86 for Agreeableness to 0,92 for Neuroticism, while the internal consistency for the facets varies from 0,56 for Tender-Mindedness and 0,18 for Depression (Costa & McCrae, 1992). Costa and McCrae (1985) as well as Van der Bank and Rothmann (in press) found that, when factor analysed, the five familiar factors emerged as expected, and these results provided strong evidence of convergent and discriminant validity of the NEO PI-R (McCrae, 1990). Van der Bank and Rothmann (in press) found the alpha coefficients of the five scales that were extracted acceptable ($\alpha > 0,70$, Nunnally & Bernstein, 1994), thus indicated the internal consistency of the factors of the NEO-PI-R (alphas for Neuroticism = 0,68; Extraversion = 0,75; Openness = 0,81; Agreeableness = 0,76; Conscientiousness = 0,71).

The *Cross-cultural Adjustment Scale* (CCAS). Expatriates rated their cross-cultural adjustment on a 5-item scale. Each item was rated on a 5-point scale varying from 1 (*not at all*) to 5 (*to a great extent*). Sample items include "Rate your adjustment to your current living conditions" and "Rate your adjustment to living in the country in general". A high score indicated greater cross-cultural adjustment. Caligiuri et al. (2001) reported an alpha coefficient of 0,83 for a similar cross-cultural adjustment scale. Van der Bank and Rothmann (in press) found the data of the questionnaire factorable (an average of 0,67) by using the Kaiser-Meyer-Olkin Measure of Sampling Adequacy and Bartlett's Test of Sphericity. Van der Bank and Rothmann (in press) found an alpha value of 0,74 for the CCAS, which is considered to be acceptable compared to the guideline of $\alpha > 0,70$ (Nunnally & Bernstein, 1994).

The *desire to terminate the assignment* (TAS) refers to an expatriate's requesting or being requested to return to his or her home country before the assignment is completed, and is measured by three items. Sample items include "Would you like to terminate this expatriate assignment early?" and "If this assignment had no effect on your career or your spouse's career, would you terminate this assignment now?" and "Do you hope that you will be asked to return home early?" The expatriates' responses were measured on a 4-point Likert scale varying from 1 (*definitely no*) to 4 (*definitely yes*). Caligiuri (2000a) reported an alpha coefficient of 0,82 for a similar questionnaire. This is an affective criterion (desire to remain or to leave) rather than a behavioural one (actually remaining or actually leaving prematurely). In their research on the expatriate sample, Van der Bank and Rothmann (in press) found an alpha value of 0,78 for the TAS.

A self-rated *Performance Appraisal Instrument* (PAI) was developed for the purpose of this study intended for all technical and managerial positions. The items were developed based on results of interviews conducted with former expatriates prior to the beginning of this study, as well as on research by Caligiuri (1997), and Gregersen et al. (1996). The aim of the items was the inclusion of both technical and contextual performance dimensions. The items measuring Performance include (1) "Rate your technical knowledge (in your field of expertise) required for this expatriate assignment", (2) "Does your work on this expatriate assignment require of you to apply your technical knowledge on a weekly basis?", (3) "How effectively do you communicate and keep others informed?", (4) "Rate your persistence in getting the work activities accomplished, even when it may be difficult to continue", (5) "Rate your understanding of the host national culture", (6) "How well do you facilitate team and peer performance?" The expatriates made six ratings of performance on a 5-point scale varying from 1 (*poor/not at all*) to 5 (*outstanding/all the time*). In this study an alpha coefficient of 0,74 was measured for the performance appraisal instrument. Caligiuri (2000a) reported a Cronbach alpha coefficient of 0,83 for a similar but supervisor-rated performance instrument.

The *Expatriate Stress Inventory* (ESI) consists of 48 items and was developed for the purpose of this study. In the expatriation context a limited number of research studies has been published regarding stressors specific to the expatriation environment (Caligiuri, 1997; Caligiuri et al., 2001; Caligiuri & Lazarova, 2002; Caligiuri & Phillips, 2003; Hechanova et al., 2003; Vollrath, 2001). These sources were used as theoretical foundation in the construction of the current instrument. In line with recommendations by Biggam et al. (1997,

p. 130) this study addressed both the severity and frequency of stressors. Firstly, participants rated each of 24 items regarding the intensity of stress on a 9-point scale. The frequency part of the questionnaire asked "how many times in the last six months" did you experience the source of stress. The ESI was subjected to a principal component factor analysis with a varimax rotation. Two internally consistent factors were extracted, namely Cultural Stress ($\alpha = 0,86$) and Organisational Stress ($\alpha = 0,84$). Acceptable alpha values ($\alpha > 0,70$, Nunnally & Bernstein, 1994) indicate the internal consistency of the factors of the ESI. Sample items for Organisational Stress include "Working overtime", "Lack of recognition for good work", and "Performing tasks not in job description". Sample items for Cultural Stress include "Lack of ability to speak the host national language", "Lack of understanding of the host national culture" and "Difficulty getting along with host nationals".

A *biographical questionnaire* was developed to gather information about the demographic characteristics of the participants. This questionnaire gave participants the option of supplying their name and the name of their company. Other information that was gathered included: age, sex, marital status, length of time on the international assignment, similarity of language spoken between home and host country, satisfaction with pre-departure training, if received, expatriates accompanied by family and the satisfaction with the support received by family, company, host nationals, friends and colleagues and expatriates' motivation for accepting the international assignment. Additional information gathered included the following items; "To what extent did you expect socialising with the host nationals would be difficult", "To what extent did you expect the host country culture to be different from your country's culture"? and "To what extent did you expect culture shock"? Firstly, participants rated each of the three items on a 5-point scale. The frequency part of the questionnaire asked "Now that you are on the international assignment, is your socialising difficult?", "Now that you are on the international assignment, is the host country culture different from your home country's culture" and "Now that you are on the international assignment, have you experienced culture shock?".

Principal component analysis of expatriates' Motivation for Accepting the International Assignment data indicated that two factors explained the variance in the data. These factors were labelled Extrinsic Motivation and Intrinsic Motivation. Items relating to the safety for self and family, financial reasons and status (Items 2, 3 and 5) loaded on the first factor,

Extrinsic Motivation. Items relating to career enhancement and enhancing personal global competence (Items 1 and 4) loaded on the second factor, Intrinsic Motivation. An acceptable Cronbach alpha coefficient for External Motivation ($\alpha = 0,68$) was obtained, but the Cronbach alpha coefficient for Internal Motivation was not acceptable and consequently was excluded from further analysis ($\alpha > 0,65$; Nunnally & Bernstein, 1994).

Statistical analysis

The statistical analysis was carried out with the help of the SPSS program (SPSS Inc., 2003). First, descriptive statistics were used to explore the data. Exploratory factor analyses and Cronbach alpha coefficients were then computed to assess the validity and reliability of the constructs which were measured in this study. Firstly, a simple principal component analysis was conducted on the constructs which form part of the measurement model. The eigenvalues and scree plot were studied to determine the number of factors. In the second step either a principal factor analysis with a direct Oblimin rotation was conducted if factors were related, or a principal component analysis with a Varimax rotation was used if the factors obtained were not related (Tabachnick & Fidell, 2001). The researchers' theoretical model was tested in regression analyses. T-tests for independent samples and one-way analysis of variance (ANOVA) were used to determine differences between the sub-groups in the sample. The practical significance of differences (d) was also computed (Steyn, 1999). A cut-off point of 0,50 (medium effect, Cohen, 1988) was set for the practical significance of differences between means.

Pearson product-moment correlation coefficients were used to specify the relationships between the variables. In the case where the distribution of scores is skew, Spearman correlation coefficients were computed. A cut-off point of 0,30 (medium effect, Cohen, 1988) was set for the practical significance of correlation coefficients.

RESULTS

Construct validity of the Expatriate Stress Inventory (ESI)

Table 1 shows factor loadings, percentage variance and covariance for principal factors extraction and oblique rotation on the stress items.

Table 1

Factor Loadings, Percentage Variance and Covariance for Principal Factors Extraction and Oblique Rotation on Stress Items

Item	F ₁	F ₂
1 Lack of ability to speak the host national language.	0,91	-0,41
2 Lack of understanding of the host national culture.	0,65	-0,19
3 Find it difficult to integrate information and business practices from various cultural sources.	0,69	0,07
4 Inadequate transfer of technical concepts and expertise.	0,74	0,03
5 Find it difficult to work effectively in the host country.	0,64	0,05
9 Find it difficult to communicate effectively and to develop good relations with host nationals.	0,80	-0,07
12 Difficulty getting along with host nationals.	0,58	0,34
15 Find it difficult to effectively inform and report to host national leaders and team mates.	0,67	0,05
18 Inadequate salary.	0,50	0,10
21 Poorly motivated co-workers.	0,58	0,01
22 Conflicts with host nationals.	0,59	0,22
23 Living conditions.	0,52	0,14
6 Working overtime.	-0,07	0,69
7 Lack of recognition for good work.	-0,54	0,80
8 Performing tasks not in job description.	-0,11	0,80
10 Assignment of increased responsibility.	0,20	0,57
14 Insufficient personnel to handle an assignment.	0,05	0,75
19 Poor or inadequate supervision.	0,26	0,45
20 Insufficient personal time (e.g., coffee breaks, lunches, holidays).	-0,16	0,75

a: Factor labels F1: Cultural Stress F2: Organisational Stress

Principal component analysis indicated that two factors were responsible for explaining the variance in the stress data. This was confirmed by eigenvalues and the Scree plot. However, Items 11, 13, 16, 17 and 24 did not load in the factor analysis and were discarded from subsequent analysis. These items dealt with periods of inactivity, the experience of negative attitudes toward expatriates, experiencing a personal insult from a customer/consumer/

colleague, experiencing a lack of participation in policy-making decisions and the experience of reorganisation and transformation within the organisation.

Table 2 reflects the severity of the stressors.

Table 2

Severity of Stressors

	Item	Intensity	Frequency	Severity
1	Lack of ability to speak the host national language.	4,79	5,07	24,29
2	Lack of understanding of the host national culture.	3,88	3,03	11,76
3	Find it difficult to integrate information and business practices from various cultural sources.	4,01	3,35	13,43
4	Inadequate transfer of technical concepts and expertise.	4,61	3,86	17,79
5	Find it difficult to work effectively in the host country.	3,63	2,95	10,71
6	Working overtime.	3,87	5,71	22,10
7	Lack of recognition for good work.	4,27	3,52	15,03
8	Performing tasks not in job description.	3,70	4,67	17,28
9	Find it difficult to communicate effectively and to develop good relations with host nationals.	4,24	3,02	12,8
10	Assignment of increased responsibility.	3,67	4,37	16,04
11	Periods of inactivity.	3,66	2,60	9,52
12	Difficulty getting along with host nationals.	3,33	1,99	6,63
13	Experiencing negative attitudes toward expatriates.	3,86	2,82	10,88
14	Insufficient personnel to handle an assignment.	4,85	4,33	21,00
15	Find it difficult to effectively inform and report to host national leaders and team mates.	3,68	2,29	8,43
16	Personal insult from customer/consumer/colleague.	3,40	1,74	5,92
17	Lack of participation in policy-making decisions.	4,85	3,45	16,73
18	Inadequate salary.	4,80	3,75	18,00
19	Poor or inadequate supervision.	3,98	2,99	11,90
20	Insufficient personal time (e.g., coffee breaks, lunches, holidays).	3,45	2,48	8,56
21	Poorly motivated co-workers.	4,91	3,99	19,59
22	Conflicts with host nationals.	3,68	1,72	6,33
23	Living conditions.	3,53	2,73	9,64
24	Reorganisation and transformation within the organisation.	4,55	3,57	16,24

It can be seen in Table 2 that the stress items which showed the highest severity, in order, are items 1, 6, 14, 21, 18, 4 and 8. These items refer to the lack of ability to speak the host national language, having to work overtime, experiencing insufficient personnel to handle assignments, the perception that co-workers are poorly motivated, perceptions of an

inadequate salary, and experiences of inadequate transfer of technical concepts and expertise, and having to perform tasks that are not in the job description.

Descriptive statistics and internal consistency of the scales

Table 3 shows the descriptive statistics and alpha coefficients for the extracted NEO-PI-R, CCAS, TAS, PAI, ESI, Cultural stress, Organisational stress and EXMOT factors.

Table 3

Descriptive Statistics for the Measuring Instruments

Variable	Mean	SD	Skewness	Kurtosis	α
Neuroticism	20,71	2,41	-0,44	-0,72	0,68
Extraversion	15,15	1,99	-0,18	-0,25	0,75
Openness	16,38	2,41	-0,39	0,34	0,81
Agreeableness	15,76	2,08	-0,26	0,05	0,76
Conscientiousness	13,93	2,16	0,30	0,06	0,71
PAI (performance)	25,63	3,18	-1,80	6,97	0,74
TAS (Termination of Assignment)	5,16	2,91	1,30	1,64	0,78
CCAS (Cross-cultural adaptation)	15,59	2,93	-0,81	0,63	0,74
Cultural stress (CS)	48,88	18,63	0,05	-0,67	0,86
Organisational stress (OS)	27,79	12,07	0,22	-0,47	0,84
Motivation (EXMOT)	9,31	3,13	0,03	-0,96	0,68

Table 3 shows that acceptable Cronbach alpha coefficients ($\alpha > 0,65$) were obtained for all of the scales (see Nunnally & Bernstein, 1994). It is evident from Table 3 that most of the various measuring instruments are relatively normally distributed, with low skewness and kurtosis. The only exceptions are PAI and TAS, which show high kurtosis and high skewness, indicating that most of the expatriates did not want to terminate the assignment.

Correlations of the scales

In this study, Pearson's product-moment coefficient of correlation (r) was used to determine the linear relationship between the variables of the various measuring instruments. Spearman correlations (ρ) rather than Pearson correlation coefficients were used when skewness of the variables were higher than 1.

Table 4

Correlations between the Measuring Instruments

Item	1	2	3	4	5	6	7	8	9	10
1. Neuroticism	-	-	-	-	-	-	-	-	-	-
2. Extraversion	-0,15	-	-	-	-	-	-	-	-	-
3. Openness	0,15	0,54++	-	-	-	-	-	-	-	-
4. Agreeableness	-0,15	0,12	0,31+	-	-	-	-	-	-	-
5. Conscientiousness	-0,29+	0,17	-0,21+	0,10	-	-	-	-	-	-
6. Performance	0,11	-0,06	-0,06	0,11	-0,40+	-	-	-	-	-
7. Termination of assignment	-0,02	0,24*	0,02	-0,06	-0,01	-0,05	-	-	-	-
8. Cross-cultural adjustment	0,03	-0,19	-0,23*	-0,10	0,12	-0,11	-0,38+	-	-	-
9. Cultural stress	-0,05	-0,01	0,16	0,15	-0,17	0,03	-0,08	-0,27*	-	-
10. Organisational stress	0,13	-0,13	-0,08	0,08	-0,24+	0,05	-0,02	-0,17	-	-
11. Extrinsic motivation	-0,23+	-0,03	0,02	0,13	-0,19	0,31+	-0,04	-0,17	0,24+	0,11

* Statistically significant correlation: $p \leq 0,05$

+ Practically significant correlation (medium effect): $r \geq 0,30$

++ Practically significant ant correlation (large effect): $r \geq 0,50$

In Table 4 a statistically negative correlation is indicated between Cross-cultural adjustment and Desire to terminate the assignment (practically significant, medium effect), Cultural stress (statistically significant) and Openness. Cross-cultural adjustment correlated negatively with the facets of fantasy (practically significant), trust and ideas (both statistically significant).

A statistically significant negative correlation is indicated between Termination of the assignment and Extraversion, in particular the facet of assertiveness. A practically significant positive correlation is pointed out between Performance and EXMOT (medium effect) and a statistically significant negative correlation between Conscientiousness and Performance. Performance shows a statistically significant positive correlation with the facets of vulnerability and fantasy and statistically significant negative correlations with competence, order, dutifulness, achievement striving, angry hostility and self-discipline (practically significant).

A negative correlation is indicated between Neuroticism and EXMOT and a positive correlation between Cultural Stress and EXMOT (all statistically significant). EXMOT shows

negative correlations with the facets of depression, order (both statistically significant) and angry hostility (practically significant) and statistically positive correlations with actions and trust.

A statistically significant negative correlation is shown between Cultural stress and Cross-cultural adjustment (statistically significant) and a practically significant positive correlation between Cultural stress and Organisational stress. Cultural stress correlated negatively with the facet of angry hostility and positively with aesthetics and values (all statistically significant).

A statistically significant negative correlation is indicated between Organisational stress and Conscientiousness. Organisational stress correlated negatively with dutifulness, activity, achievement striving (all practically significant), assertiveness and competence (statistically significant) and positively with vulnerability (practically significant) and impulsiveness (statistically significant).

Independent T-tests for independent samples were carried out on the biographical data, Performance Appraisal Instrument, Termination of the Assignment Scale, Cross-Cultural Adjustment Scale, Cultural Stress and Organisational Stress. Table 5 indicates results of t-tests for the biographical data, PAI, TAS, CCAS, ESI (Cultural Stress and Organisational Stress).

Table 5
T-Test Results

Item	Performance	Termination of assignment	Cross-cultural adjustment	Cultural Stress	Organisational stress
Speak the same language					
<i>p</i>	0,49	0,97	0,13	0,80	0,52
<i>d</i>	0,13	0,01	0,28	0,05	-0,13
Pre-departure training					
<i>p</i>	0,23	0,23	0,99	0,73	0,60
<i>d</i>	0,23	0,24	-0,00	0,07	0,11
Supported by family					
<i>p</i>	0,68	0,04*	0,05	-	0,11
<i>d</i>	0,41	-2,06	1,96++	2,62++	-1,62
Supported by parent company					
<i>p</i>	0,29	0,38	0,96	0,15	0,00*
<i>d</i>	0,22	-0,27	-0,02	-0,42	-0,93
Supported by host company					
<i>p</i>	0,16	0,65	0,65	0,00*	0,22
<i>d</i>	0,38	-0,13	0,14	-0,72	-0,41
Supported by host nationals					
<i>p</i>	0,12	0,63	0,09	0,11	0,62
<i>d</i>	0,39	-0,15	0,54+	0,56+	-0,15
Supported by friends/other					
<i>p</i>	0,85+	0,51	0,08	0,09	0,47
<i>d</i>	-0,07	-0,23	0,65	-0,67	-0,22

* Statistically significant ($p < 0,05$)

+ Practically significant – medium effect ($d > 0,50$)

++Practically significant – large effect ($d > 0,80$)

The results of t-tests indicate that expatriates measuring high on family support differed statistically significantly (large effect) from those who are not supported by their family with regard to the desire to terminate the assignment. In addition, the results showed that expatriates measuring high on parent company support differed statistically significantly from those who are not supported by the parent company on Organisational Stress and expatriates measuring high on support from the host company differed statistically significantly from those who are not supported by the host company on Cultural Stress. Consequently, expatriates who experience family support will indicate a desire to stay on the assignment.

The results also showed that expatriates who experience support from the parent company do not experience Organisational stress and expatriates who experience support from the host company do not report Cultural stress.

Multiple regression analyses

The results of a multiple regression analysis with Cross-Cultural Adjustment (as measured by the CCAS) as dependent variable and Cultural Stress (as measured by the ESI), EXMOT (as measured by expatriates' Motivation for accepting the assignment), Ideas, Fantasy, Assertiveness and Trust (as measured by the NEO-PI-R) as independent variables are shown in Table 6. A significance level of $p < 0,01$ was set.

Table 6

Regression Analysis with Cross-Cultural Adjustment as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	(Constant)	23,64	2,53		9,36	0,00	2,63	0,41	0,17	0,168
	Cultural stress	-0,04	0,17	-0,24	-2,25	0,03				
	Extrinsic motivation	-0,01	0,11	-0,01	-0,05	0,96				
	Ideas	-0,03	0,08	-0,05	-0,33	0,75				
	Fantasy	-0,12	0,07	-0,23	-1,71	0,09				
	Assertiveness	-0,10	0,08	-0,12	-1,14	0,26				
	Trust	-0,05	0,07	-0,07	-0,64	0,53				

Table 6 shows that 17% of the variance in the Cross-cultural adjustment of expatriates (as measured by CCAS) is predicted by Cultural stress. Cultural stress is the only statistically significant predictor of expatriates' cross-cultural adjustment (17% of the variance explained).

The results of a multiple regression analysis with Termination of the assignment (as measured by the TAS) as dependent variable and EXMOT (as measured by expatriates' Motivation for accepting the assignment), Ideas, Fantasy, Assertiveness, Trust (as measured by the NEO-PI-R), Cross-Cultural Adjustment (as measured by the CCAS) and Cultural Stress (as measured by the ESI) as independent variables are shown in Table 7.

Table 7

Regression Analysis with Termination of the Assignment as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	(Constant)	10,42	3,58		2,91	0,01	4,12	0,53	0,28	0,279
	Extrinsic Motivation	-0,11	0,09	-0,12	-1,20	0,24				
	Ideas	-0,14	0,07	-0,24	-1,92	0,06				
	Fantasy	0,04	0,07	0,08	0,63	0,53				
	Assertiveness	0,22	0,08	0,27	2,77	0,01				
	Trust	0,06	0,07	0,09	0,91	0,37				
	Cross-cultural Adjustment	-0,42	0,10	-0,42	-4,08	0,00				
	Cultural stress	-0,04	0,02	-0,21	-2,03	0,05				

Table 7 shows that 28% of the variance in expatriates' desire to terminate the assignment is predicted by expatriates' cross-cultural adjustment and Assertiveness. These two variables explained approximately 28% of the variance in expatriates' desire to terminate the assignment.

The results of a multiple regression analysis with Performance (as measured by the PAI) as dependent variable and EXMOT (as measured by the biographical questionnaire), Ideas, Fantasy, Assertiveness, Trust (as measured by the NEO-PI-R), Cross-cultural Adjustment (as measured by the CCAS), Cultural Stress (as measured by the ESI) and Termination of the assignment (as measured by the TAS) as independent variables are shown in Table 8.

Table 8

Regression Analysis with Performance as Dependent Variable

Model		Unstandardized Coefficients		Standardized Coefficients	<i>t</i>	<i>p</i>	<i>F</i>	<i>R</i>	<i>R</i> ²	ΔR^2
		B	SE	Beta						
1	(Constant)	40,54	5,41		7,50	0,00	2,20	0,44	0,20	0,195
	Extrinsic Motivation	0,39	0,14	0,31	2,90	0,00				
	Ideas	0,05	0,11	0,07	0,50	0,62				
	Fantasy	-0,02	0,09	-0,03	-0,25	0,81				
	Assertiveness	-0,25	0,12	-0,23	-2,11	0,04				
	Trust	-0,04	0,10	-0,05	-0,45	0,66				
	Cross-cultural Adjustment	0,07	0,16	0,05	0,42	0,68				
	Cultural stress									
	Termination of the assignment	-0,01	0,03	-0,03	0,25	0,80				
		-0,20	0,15	-0,15	-1,31	0,20				

Table 8 shows that 20% of the variance in Performance of expatriates (as measured by the PAI) is predicted by Extrinsic Motivation. However, Extrinsic Motivation is the only significant predictor of expatriates' performance. This variable explained 20% of the variance in the performance of expatriates.

DISCUSSION

The aims of this study were to assess the relationships between expatriates' personality dispositions, biographical factors, stress, expatriates' desire to terminate the assignment, cross-cultural adjustment and their performance. Cronbach alpha coefficients for all instruments indicated their internal consistency. The factor analyses resulted in acceptable loadings on the various factors, which confirm their construct validity. The results of this study showed that the predictors of expatriates' success are complicated and varied.

One of the important contributions of this study was finding a positive relationship between adjustment and the desire to terminate the assignment, as it is commonly cited that expatriate failure is often a result of poor adjustment (Aycan & Kanungo, 1997). Results from the multiple regression analysis indicated that expatriates' desire to terminate the assignment was best predicted by assertiveness and expatriates' cross-cultural adjustment.

The results lend some support for the general hypothesis that the Big Five personality characteristics are related to expatriates' desire to terminate the assignment and their cross-cultural adjustment. The results showed that extraverted expatriates who are assertive and do not adjust cross-culturally will terminate the assignment. This finding confirms the results of previous studies (Black, 1988; Caligiuri, 1997; Tung, 1981) in that cross-cultural adjustment is negatively related to the premature termination of the assignment and in that extraversion is a significant predictor of the expatriates' desire to terminate an assignment (Caligiuri, 2000a). Contrary to expectations the results showed that open individuals measuring high on fantasy, trust and ideas will not adapt cross-culturally. The reason may be that 42% of the sample represented expatriates from countries in Africa, that they have conventional values, are realistic and pragmatic and do not have a need to explore the experience for deeper meanings.

The results of this study provide initial evidence that expatriates who are well adjusted to the new environment and who are comfortable interacting with host nationals will have the ability to speak the host national language, interpret the host national culture and find it easy to get along with the host nationals. These results confirmed our hypothesis and in part the results from Caligiuri et al. (2001) that being able to speak the host national language and being able to interact with the host nationals in a non-confrontational manner is related to expatriates' adjustment. Thus evidence was found in that personality dispositions are not enough to influence social interactions, especially if the expatriate has only limited opportunities for interaction. Language, culture and non-confrontational interaction with host nationals, as additional factors, will either enhance or limit the opportunities and quality of interactions with host nationals, depending on the expatriates' linguistic ability and interpersonal skills, thus determining the cross-cultural adaptation of the expatriate.

In exploring the possible predictors of expatriates' performance an important forecaster identified was expatriates who are motivated by money, status and the fact that the international assignment increased the safety of their family. In addition, the results showed that expatriates who are motivated by these extrinsic motivators (money, status and the safety of their family) will experience the cultural stressors of a lack of ability to speak the host national language and interpret the host national culture, as well as finding it difficult to get along with the host nationals, all related to not adjusting cross-culturally. The results showed that expatriates who are motivated by money, status and the fact that the international assignment increases the safety of their family will develop interpersonal relationships with

others on the international assignment as they tend not be angry and hostile and will rather trust others.

Contrary to expectations, conscientiousness showed a negative relationship with expatriates' self-rated performance. This therefore suggests that conscientious expatriates from this sample will not necessarily feel a greater sense of commitment to their tasks. This does not support results from Mount et al. (1998) and Caligiuri (2000a) that conscientiousness predicts supervisor-rated performance. In their research Van der Bank and Rothmann (2003) found no additional evidence for the relationship between performance and conscientiousness. Thus, it seems as if the personality variable of conscientiousness does not predict the performance of expatriates. This finding might be explained by the fact that expatriates are well-selected employees who have probably performed well over years and that those who were not sufficiently conscientious, were already removed from the organisation. This might have contributed to a restriction of range problems. Therefore, this finding does not mean that expatriates do not need to be conscientious.

Furthermore, a self-rated questionnaire was used in this study and not a supervisor-rated performance measure as in the studies done by Van der Bank and Rothmann (2003) and Caligiuri (2000a). Thus, the results and relationships in terms of self-rated performance could not be generalised to expatriates' supervisor-rated performance. However, results from the multiple regression analysis indicated that expatriates' performance was best predicted by expatriates who are motivated by money, status and the fact that the international assignment increased the safety of their family. This finding suggests that the motivation for making the commitment to the international assignment is important for expatriates' performance.

This is the first study we are aware of that investigated the relationship between stressors experienced and expatriates' cross-cultural adjustment. Results from the multiple regression analysis indicated that expatriates' cross-cultural adjustment was best predicted by their experiencing cultural stress. Additionally, the empirical evidence showed that expatriates who experience the lack of ability to speak the host national language and interpret the host national culture as well as find it difficult to get along with the host nationals will also experience organisational stress. In addition, the results showed that personality influenced the stress of expatriates. The results showed that conscientious and assertive expatriates, who experienced less organisational stress and who do not adapt cross-culturally considered

terminating the assignment. The results showed that expatriates measuring high on Aesthetics and Values as facets of Openness experienced cultural stress. Results from the t-tests provide additional evidence in that personality dispositions are not adequate to influence the outcome of the expatriate assignment.

Another important contribution of this study was the finding of a positive relationship between family support and expatriates' desire to terminate the assignment. The result confirms the hypothesis that family support helps expatriates manage the cross-cultural transition (Caligiuri et al., 1998) and that expatriates' failure is most frequently due to their families' poor adjustment (Arthur & Bennet, 1995; De Cieri et al., 1991; Dennis & Stroh, 1999). A surprising non-finding was with regard to pre-departure training as a predictor of expatriate success. Thus, no support was found for pre-departure training as an imperative to the success of the international assignment (Caligiuri & Phillips, 2003).

The results also confirmed the opinion of Kraimer et al. (2001) and Mendenhall and Oddou (1985) in that support from the parent company is a strong predictor of expatriates' adjustment to the stress associated with relocation. The results showed that expatriates who experience support from the parent company do not experience organisational stress and expatriates who experience support from the host company do not report cultural stress. Thus, the results support De Cieri (1991) and Harvey (1985) in that company assistance cannot be viewed as a luxury. The results also showed that expatriates who experience support from host nationals will adjust cross-culturally and will not experience cultural stress, while expatriates who reported that they are supported by friends will perform better. The results support findings of various researchers in that social support by friends and host nationals is important for expatriate success through enhancing expatriates' psychological well-being (Black et al., 1991; Briody & Chrisman, 1991; McEvoy & Parker, 1995; Parker & McEvoy, 1993).

The results illustrated that most of the expatriates expected culture shock and subsequently indicated that they did not experience culture shock. Most expatriates experienced socialising to be as difficult as expected and most expatriates' expectations were met regarding the host national country's culture to be different from their own country's culture. Thus, the results of this study supports the findings of Caligiuri and Phillips (2003) that expectations created

prior to an expatriate going on the global assignment are important in adjusting to the international assignment.

While this study makes an important contribution to expatriate research, it has various limitations. The sample of expatriates was predominantly from South Africa. Future studies should test these hypotheses with samples of expatriates from around the world. In addition, the sample in this study included more than eight South African-based multinational organisations from a wide variety of industries. Unfortunately, it was not possible to conduct an analysis by industry, given the nature of the sample. Future studies should examine the combined effect of industry and nationality to expand the generalisability of the findings.

Care was taken to reduce potential biases in this study. For example, the demographic variables were assessed at the front end of the survey, and the criterion variables, cross-cultural adjustment, the desire to terminate the assignment and performance were placed at the end. This was made in an effort to reduce the possibility of self-generated validity. In addition to the concern for self-generated validity, attention was paid to the possibility of inflationary bias. Inflationary bias is a potential concern when both the criteria and predictors are self-reported (Crampton & Wagner, 1994). Future studies should gather data from multiple sources, whenever possible. For example, multiple assessments of an expatriate's cross-cultural adjustment (e.g. self, spouse) should be examined to increase the reliability of the cross-cultural adjustment measure. Another limitation of this study was the inability to test the model because of the skew distribution regarding expatriates' desire to terminate the assignment and their performance.

In the context of expatriate success, there are many other predictors that should be examined in future studies. Comprehensive theoretical models have included many additional predictors of expatriate adjustment (e.g. McEvoy & Parker, 1995). For example, perceptions of host ethnocentrism (Florkowski & Fogel, 1999), perceived organisational support upon repatriation (Selmer, 1998), expatriate mentoring (Feldman and Bolino, 1999) and family adjustment (Caligiuri et al., 1998). Future studies should take a broader perspective to examine these predictors. Little research has examined the effects of organisational support or supervisor support on expatriates' adjustment. The role of cross-cultural training as an antecedent of cross-cultural adjustment needs to be explored.

Despite the evidence that poor performance on expatriate assignments may be due to a lack of motivational factors for accepting the assignment, the relationship between expatriates' performance and their cross-cultural adjustment needs to be explored in future studies. The appropriate definition of expatriate job performance needs to be developed subject to theoretical development. It is recommended that both technical performance and contextual performance be included in the performance measurement of expatriates.

In this study technical performance and contextual performance were combined and were referred to as Performance. It is recommended that both task and expatriate contextual performance be measured as outcomes of expatriate adjustment.

RECOMMENDATIONS

Based on the results of this study, the personality characteristics of extraversion and openness are recommended for use in expatriate selection systems in conjunction with stressors, family support and motivation. Studying the Big Five personality dimensions in relation to the stress expatriates experience constitutes a particularly promising approach that is able to provide a broad, accepted basic framework for future research. However, personality constructs need to be integrated into a transactional process-oriented approach in which the interplay of situational, cognitive, behavioural and psychological processes is analysed over time.

It is important for organisations to realise that support of an expatriate is imperative to the success of the assignment and that the company's support of an expatriate will extend past the boundaries of the work environment. The company should consider offering additional support to providing pre-departure cross-cultural training and financial support. Finding that expatriate adjustment relates to termination of the assignment suggests that it is worth the company's time and expense to help expatriates adjust to the international assignment and develop the skills needed to interact and adjust.

This study used a cross-sectional design, resulting in an inability to determine causal relationships. Longitudinal research is needed in order to provide further evidence that adjustment precedes terminations of the assignment and job performance

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CHAPTER 5

CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS

In this chapter, conclusions are drawn regarding the specific objectives of this study. The limitations of the research are discussed, followed by recommendations for the organisation and future research.

5.1 CONCLUSIONS

Next, conclusions are made based on the specific research objectives.

The first research objective was to determine the relationship between locus of control, coping and expatriates' desire to terminate the assignment. An additional objective was to determine the underlying coping dimensions of the COPE when applied in the expatriate context.

The results of the factor analysis of the COPE in Article 1 showed a three-factor solution, namely Approach Coping, Seeking Emotional Support and Avoidance. The first factor labelled Approach Coping, included Active Coping, Planning, Suppression of Competing Activities, Acceptance and Positive Reinterpretation and Growth. The second factor labelled as Seeking Emotional Support included Seeking Social Support for Emotional Reasons, Seeking Social Support for Instrumental Reasons and Focus On Venting of Emotion. Avoidance Coping included Denial, Behavioural Disengagement and Mental Disengagement, Turning to Religion and Alcohol/Drug Disengagement. The non-emergence of Turning to Religion as a separate factor is an indication that it seems not to be an important separate coping strategy for expatriates. The alpha coefficients of the COPE factors were acceptable, indicating that the extracted factors were internally consistent.

External locus of control was found to be an internally consistent factor for the WLCS and best predicted avoidance coping. Internal locus of control was an internally consistent factor for the WLCS and best predicted approach coping. Thus, expatriates with an internal locus of control used approach coping strategies in managing stressful situations because these situations are seen as being within their personal control, compared to expatriates with an

external locus of control, who were inclined to cope with frustrations by using Avoidance coping strategies like withdrawing.

The second research objective was to assess the relationships between personality traits, locus of control, expatriates' desire to terminate the assignment and their cross-cultural adjustment.

The results in Article 2 showed that assertive expatriates who do not adjust cross-culturally will terminate the assignment. The finding confirms the results of previous studies (Black, 1988; Caligiuri, 1997, 2000; Tung, 1981) in that cross-cultural adjustment is negatively related to the premature termination of the assignment, and in that extraversion is a significant predictor of the expatriates' desire to terminate an assignment (Caligiuri, 2000). The results lend some support to the general hypothesis of the study as well as previous studies (Black, 1988; Caligiuri, 1997) in that the Big Five personality characteristics are related to expatriates' desire to terminate the assignment and their cross-cultural adjustment. Contrary to previous findings (Caligiuri, 2000), the results showed that open individuals measuring high on fantasy, trust and ideas will not adapt cross-culturally (Caligiuri, 2000). The reason may be that 42% of the sample represented expatriates from countries in Africa, that they have conventional values, are realistic and pragmatic and do not have a need to explore the experience for deeper meanings. Additionally, in the context of culture shock theory, realistic expectations about all aspects of expatriates' new life are directly correlated to their adaptation and happiness (Caligiuri et al., 2001; Furnham & Bochner, 1986).

The results of Article 2 indicated that conscientious individuals reported an external locus of control, which does not support the results from Zellars et al. (2000). The skew distribution regarding locus of control (indicating that most expatriates reported an internal locus of control) may explain the results and absence of significant relationships in this study. The results also showed that expatriates who reported an external locus of control do not predict depression, tend to trust others and reported themselves as conscientious individuals.

The third research objective was to determine whether expatriates' success of the international assignment as determined by their cross-cultural adjustment, performance and desire to terminate the assignment could be predicted, based on demographic variables, stress and personality dispositions.

The results of Article 3 provided evidence in that the predictors of expatriates' success are complicated and varied, and in that personality dispositions are not enough to influence social interactions, especially if the expatriate has only limited opportunities for interaction. Language, culture and non-confrontational interaction with host nationals, as cultural stress factors, will either enhance or limit the opportunities and quality of interactions with host nationals, depending on the expatriate's linguistic ability and interpersonal skills, consequently influencing the cross-cultural adaptation of the expatriate. These results confirmed our hypothesis, and in part the results from Caligiuri et al. (2001), that being able to speak the host national language and the ability to interact with the host nationals in a non-confrontational manner, is related to expatriates' adjustment. In addition, expatriates who are well adjusted to the new environment and who are comfortable interacting with host nationals will have the ability to speak the host national language, interpret the host national culture and will find it easy to get along with the host nationals.

Unique to this study, article 3 showed that expatriates who are motivated by money, status and the fact that the international assignment increased the safety of their family is related to their performance. In addition, the results showed that expatriates who are motivated by these extrinsic motivators (money, status and the safety of their family) will experience cultural stressors and will develop interpersonal relationships with others on the international assignment as they tend not be angry and hostile and will rather trust others. Thus, the motivation of expatriates for accepting the international assignment is a significant and new predictor of expatriate success.

Results showed that conscientious expatriates from this sample will not necessarily feel a greater sense of commitment to their tasks and that they do not view giving the impression to others that conscientiousness is an adaptive mechanism to enhance one's reputation in the organisation to be related to their performance. This does not support the results of Mount et al. (1998) and Caligiuri (2000) in that conscientiousness predicts supervisor-rated performance.

Another unique contribution of this study was the relationships found between stressors experienced and expatriates' cross-cultural adjustment. Results from the multiple regression analysis showed that expatriates' cross-cultural adjustment was best predicted by cultural

stress. This result confirmed our hypothesis, and in part the model proposed for expatriate success.

The results also indicated that expatriates who experience a lack of the ability to speak the host national language and to interpret the host national culture, and who also find it difficult to get along with the host nationals, also experienced organisational stress. Additionally, the results showed that personality dimensions were related to stress of expatriates. The evidence indicated that conscientious and assertive expatriates did not experience organisational stress, and that assertive expatriates who did not experience organisational stress and did not adapt cross-culturally, considered terminating the assignment.

The results showed that expatriates measuring high on Aesthetics and Values as facets of Openness experienced cultural stress. The results indicating that expatriates who experience family support will want to stay on the assignment, will experience cross-cultural adjustment and cultural stress but not organisational stress are all another unique contribution by this study. The results confirm our hypothesis, and in part the model for expatriate success, in that family support helps expatriates manage the cross-cultural transition (Caligiuri et al., 1998). A surprising finding was that pre-departure training did not predict expatriate success. However, support was provided for the importance of the multinational company's support as a predictor of expatriates' cross-cultural adjustment, their desire to terminate the assignment and their performance (Caligiuri et al., 2001; Porter & Tansky, 1999).

In support of the model of expatriate success proposed in the study, the results show that expatriates who experience support from the parent company do not experience organisational stress and expatriates who experience support from the host company do not report cultural stress. Thus, the results support De Cieri (1991) and Harvey (1985) in that company assistance is imperative to the success of the expatriate assignment.

The results also demonstrate that expatriates who experience support from host nationals will adjust cross-culturally and will not experience cultural stress, while expatriates who reported that they are supported by friends will perform better. The results support various researchers in that social support by friends and host nationals is important for expatriate success through enhancing expatriates' psychological well-being (Black et al., 1991; Briody & Chrisman, 1991; McEvoy & Parker, 1995; Parker & McEvoy, 1993). Additionally, the results support

Caligiuri and Phillips (2003) in that expectations created prior to an expatriate's going on the global assignment are important to the cross-cultural adjustment of expatriates.

Another objective of the study was to develop a measure of expatriate stress in the South African context. The Expatriate Stress Inventory was developed for this study, focussing on typical work and environmental stressors that had been identified in previous research on expatriates. The results of Article 3 showed a two-factor solution in describing expatriate stress. The two extracted factors, cultural stress and organisational stress showed internal consistency with acceptable alpha values.

5.2 LIMITATIONS

The sample was one limitation of this study. Although the expatriates from the organisations seemed, in many respects, typical of expatriates in many South African companies, future studies should attempt to replicate the findings with other organisations in diverse industries. In addition, these expatriates were assigned from a wide variety of countries. Statistical power in this study was also a concern, given the relatively small sample size. Although the sample sizes from any one country were too small to do country analyses, future studies should test the proposed universality of personality characteristics as predictors of expatriate success. Although large diverse sample sizes are both desirable and encouraged, it is somewhat challenging to gain access to several expatriates in any one company or to gain access to several companies at the same time. Future studies should attempt to sample a broader number of organisations to improve both sample size and generalisability. Unfortunately, it was not possible to conduct an analysis by industry, given the limitation of the data collection. Future studies should examine the combined effect of industry and nationality to expand the generalisability of the findings. The skew distribution of the data was another limitation of this study. Most expatriates indicated that they did not want to terminate the assignment, resulting in limited statistical analyses and statistical power.

A few considerations should be kept in mind with respect to the way in which the criterion variables were measured. First, this study assessed expatriates' desire to terminate the assignment as an affective response instead of the expatriates' actual behaviour of either

terminating or completing their assignments. Future studies should also examine actual behaviours to remain in, or terminate, global assignments.

The use of self-report measures can be considered a limitation, specifically with reference to the performance criterion. In this study technical and contextual performance was combined and was referred to as Performance. It is recommended that both task and expatriate contextual performance be measured as outcomes of expatriate adjustment. If practicable, future studies should include multiple raters (360° evaluations) and multiple raters with one rater type (e.g. a home and host supervisor). However, the context from which the expatriates' performance is being rated should be considered. With expatriates low inter-rater agreement might be found even within a rater type due to the differences in performance theories that the raters may have, depending on the location of the rater (i.e. home vs. host country manager). For example, a "home" supervisor might view a profitable subsidiary a positive indicator of an expatriate's performance, whereas the host national supervisor may view the expatriate's strategy as short-term and detrimental to long-term business relationships. These two supervisors would view the expatriate's performance in very different ways.

The lack of clarity about what constitutes "cross-cultural adjustment" and how it changes over time may be a limitation to this study. Numerous variables have been utilised as indices of adjustment: acceptance of the host culture, satisfaction, feeling of acceptance as well as acquisition of culturally appropriate behaviour and skills. It has become imperative to differentiate between psychological and sociocultural dimensions in the prediction of adjustment and in the measurement of cross-cultural adjustment.

Care was taken to reduce potential biases in this study. For example, the demographic variables were assessed at the front end of the survey, and the criterion variables, cross-cultural adjustment, the desire to terminate the assignment and performance were placed at the end. This was done in an effort to reduce the possibility of self-generated validity. In addition to the concern for self-generated validity, attention was paid to the possibility of inflationary bias. Inflationary bias is a potential concern when both the criteria and predictors are self-reported (Crampton & Wagner, 1994). Future studies should gather data from multiple sources, whenever possible. For example, multiple assessments of an expatriate's cross-cultural adjustment (e.g. self, spouse) should be examined to increase the reliability of the cross-cultural adjustment measure. Another limitation of this study was the inability to

test the model because of the skew distribution regarding expatriates' desire to terminate the assignment and their performance.

In the context of expatriate success, there are many other predictors that should be examined in future studies. Comprehensive theoretical models have included many additional predictors of expatriate adjustment (e.g. Aycan, 1997; McEvoy & Parker, 1995). For example, perceptions of host ethnocentrism (Florkowski and Fogel, 1999), perceived organisational support upon repatriation (Selmer, 1998), expatriate mentoring (Feldman and Bolino, 1999) and family adjustment (Caligiuri et al., 1998). Future studies should take a broader perspective to examine these predictors. Aycan's (1997) model of expatriate acculturation highlighted the important role that organisations play in the adjustment of expatriates, yet little research has examined the effects of organisational support or supervisor support on expatriates' adjustment. The role of cross-cultural training as antecedents of cross-cultural adjustment needs to be explored.

Lastly, the study used a cross-sectional design to study the relationships between personality dispositions, coping and adjustment of expatriates. Causal relationships cannot really be deduced with this design. A longitudinal or experimental design is essential to determine causal relationships.

5.3 RECOMMENDATIONS

Next, recommendations for the organisation and future research are made.

5.3.1 Recommendations for the organisation

Given the extraordinarily high financial, relational and emotional costs for expatriates (Black, Gregersen & Mendenhall, 1992), their families (Caligiuri, et al., 1998, Guzzo, Noonan & Elron, 1994) and their organisation (Zeira & Banai, 1985), understanding who will benefit most from being on a foreign assignment is important. In a practical sense, the key question this study tried to answer was whether demographic variables, stress and personality dispositions could predict expatriate success. Based on this study, the personality characteristics of extraversion and openness are recommended for use in expatriate selection

systems in conjunction with stressors, family support and motivation. In addition, it is recommended that companies measure expatriate success not just in terms of the completion of the international assignment, but also to determine expatriates' performance as well as their cross-cultural adaptation.

It is recommended that selection systems for global assignments should include a personality assessment very early in the selection process. As this research suggests, organisations should articulate to their employees that an expatriate assignment is not right for everyone. This should be conveyed early on in the process. Organisations will get the best possible expatriate assignees when they consider many possible candidates and engage the candidates' decision-making processes long before a position becomes available. This decision-making process, with assessment of their personality, will help them decide whether the assignment is really right for them. That is, the decision needs to be made mutually among the employee, his or her organisation and his or her family.

After selecting expatriate assignees who will benefit most from the experience, multinational organisations should promote positive contacts between their host national employees and expatriate employees, and expatriates should be encouraged to learn from the host nationals. This can be facilitated through performance assessment that encourages collaboration between the expatriates and their host national colleagues.

The results of this study have implications for the management of expatriates on foreign assignments. It is important for organisations to realise that support of an expatriate is imperative to the success of the assignment and that the company's support of an expatriate will extend past the boundaries of the work environment, impacting on the parent as well as the host company. The company should consider offering additional support to providing pre-departure cross-cultural training and financial support. The finding that expatriate adjustment relates to termination of the assignment suggests that it is worth the company's time and expense to help expatriates adjust to the international assignment and develop the skills needed to interact and adjust.

In general, it can be said that the expatriates of the two multi-national companies show constructive coping strategies. Expatriates could benefit from a training programme in coping skills and locus of control. The effectiveness of such training depends upon whether any

change in the individual's locus of control and /or coping strategies will be adequate to reduce the amount of strain the individual actually experiences, either short or long term.

These practices combined could result in well-adjusted expatriates on these critical global assignments and in turn, the improved cross-cultural adjustment of expatriates should lead to better performance in the global arena.

5.3.2 Recommendations for future research

The following recommendations are made for future research:

- It is recommended that future studies include country analyses if the sample size allows it, in order to test universality of the results.
- It is recommended that future research use a longitudinal or experimental design in order to determine causal relationships.
- It is necessary to investigate coping strategies in conjunction with factors leading to stress. If sample size allows, future studies could also investigate structural equivalence and items bias and identify coping strategies according to country analyses. It is proposed that future research should look for at least three factors in coping, namely active, avoidant and social/emotional factors.
- Following other researchers (Kowalski & Crocker, 2001), it is also recommended here that studying the functions and effectiveness of coping strategies would facilitate a more complete understanding of coping. Future studies of expatriate coping should be done in conjunction with personality measures, to clarify the relationship between personality variables and coping dispositions.
- Studying the Big Five personality dimensions in relation to the stress expatriates experience constitutes a particularly promising approach that is able to provide a broad accepted basic framework for future research. However, personality constructs need to be integrated into a transactional process-orientated approach in which the

interplay of situational, cognitive, behavioural and psychological processes is analysed over time.

- Correctly identifying criteria in expatriate research will aid in theory-building in this area. Future studies of expatriates should carefully select a criterion based on the theory to be tested by their research. Models predicting these criteria should be considered separately, or interrelatedly, but not as if they were one and the same.
- Despite the evidence from this study that poor performance on expatriate assignments may be due to a lack of motivational factors for accepting the assignment, the relationship between expatriates' performance and their cross-cultural adjustment needs to be explored in future studies. The appropriate definition of expatriate job performance needs to be developed, subject to theoretical development. It is recommended that both technical performance and contextual performance are included in the performance measurement of expatriates.
- Past research suggests that geographic relocations cause a tremendous disruption in the lives of all family members (Guzzo, et al., 1994). Little research exists on the role of the family as a whole (including children) as a predictor of the outcome of expatriate assignments. Past research has focused on the cross-cultural adjustment of expatriates only (Black & Gergersen, 1991; Black & Stephens, 1989; Fukuda & Chu, 1994; Schneider & Asakawa, 1995). The researcher suggests that the adjustment of the spouse and the children plays an important role in relocations (Harvey, 1985). The identification of key family characteristics may aid researchers in their study of family adjustment and the impact on expatriates' effectiveness.

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