A Mixed Methods Investigation on British Expatriate Assignment Success

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Abstract

Psychological research on expatriation has been dominated by North American researchers, and expatriation models have been tested using predominantly US employee samples. This dominance may bias our understanding of expatriation and influence the practice of expatriate assignments within organisations. This thesis addresses the need for European expatriation research, and investigates expatriate assignment success from a British employee perspective. A sequential mixed-methods design was used to examine whether existing knowledge on predictors for successful expatriate assignments can be generalised to British samples. The first phase of the research was a qualitative exploration of factors that contribute to expatriate assignment success from the British employee perspective. Four focus groups were conducted with formerly expatriated British employees (n=14). An inductive thematic analysis was conducted on the focus group transcripts, which resulted in nine themes highlighting the importance of individual, organisational, and contextual-level variables. Moreover, the analysis highlighted an important outcome variable that has been largely ignored in previous research: whether or not the employee would go on another expatriate assignment. From the results of phase one, an initial model of British expatriate assignment success was hypothesised. Phase two involved the practical application of the variable considered most important in contributing to expatriate assignment success from study one: personality. A new expatriate assignment personality instrument was developed in phase two using a sample of British employees (n=402). The third phase of the research combined the results of the previous two phases, and employed an embedded mixed-methods design to further investigate British expatriate assignment success. Data (n=155) was collected using an online questionnaire sent to currently expatriated (n=91) and formerly expatriated British employees (n=45), as well as their accompanying partners (n=19 expatriate/partner dyads). The quantitative element explored the influence of several individual, organisational, and contextual variables on various expatriate assignment success outcome measures. Qualitative data was also collected through open-ended questions placed within the questionnaire to help explain and support the quantitative results, and identify potential areas for future research. Finally, the newly developed personality instrument from phase two was further examined for psychometric robustness. Overall, this thesis presents an initial model of British expatriate assignment success and a new personality instrument for British expatriate selection and assessment contexts. The theoretical and practical implications of these results are discussed together with suggestions for future research.

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Preface

The highly volatile and competitive business environment of the twentieth century has resulted in many organisations adopting a multinational strategy to remain competitive (Aryee, Chay, & Chew, 1996). Wan, Hui and Tiang (2003) proposed that businesses could no longer remain profitable whilst remaining solely in their home country and, as a result, today's organisations are relocating more and more of their employees abroad in order to remain competitive and capitalise on foreign markets. Ensuring the success of expatriate assignments is pivotal to organisations' competitiveness and the expatriated employees are seen to play a key role in achieving this success (Woods, 2003). Expatriate assignment failures are costly to organisations, as well as to their employees and national economies. Therefore, psychological research on what contributes to expatriate assignment successes or failures is important.

Expatriated individuals move from their home country and culture to a different culture and country. This can be a complex and confusing situation not only for the individuals involved, but also for the organisations that are involved in the transition. There has been a lot of research into the process of expatriation. However, often the research findings are not used in practice and are sometimes perceived as inappropriate or irrelevant by practitioners and organisations. Much expatriation research has been conducted within North America, often using student samples, which is perceived to produce a biased and potentially unrepresentative perspective. Scullion and Brewster (2001) argue that European expatriation research could hold promising results for the field and would be beneficial for US academics and expatriation managers.

This thesis attempts to explore EU expatriation from a British perspective in an attempt to enhance evidence-based practice. It is divided into eleven chapters, as displayed in figure 1.1. The first chapter introduces the area of expatriate assignments and the importance of successful assignments for organisations, employees, and economies. Towards the end of the chapter, the need for more non-US expatriation research is acknowledged and the importance of conducting expatriation research within a British expatriate population is discussed. From this discussion, the final section of the chapter introduces the research aim to explore British expatriate assignment success.

Chapter two presents a review of the empirical research literature on expatriate assignment success and the various proposed models of expatriation. The British expatriation literature is then reviewed and gaps in existing knowledge are identified. This drives the research design and objective of the thesis to explore the important factors that contribute to British expatriate assignment success and attempt to reduce the gap that exists between research and practice.

Chapter three presents the methodology of the thesis. The chapter outlines the philosophical position, methodology, and methods employed in the research. The chapter also presents the important issues of reliability, validity, and generalisability in relation to both quantitative and qualitative research methods, and how the present research was designed with these psychometric properties in mind. The chapter concludes with a summary outlining the overall aim of the thesis.

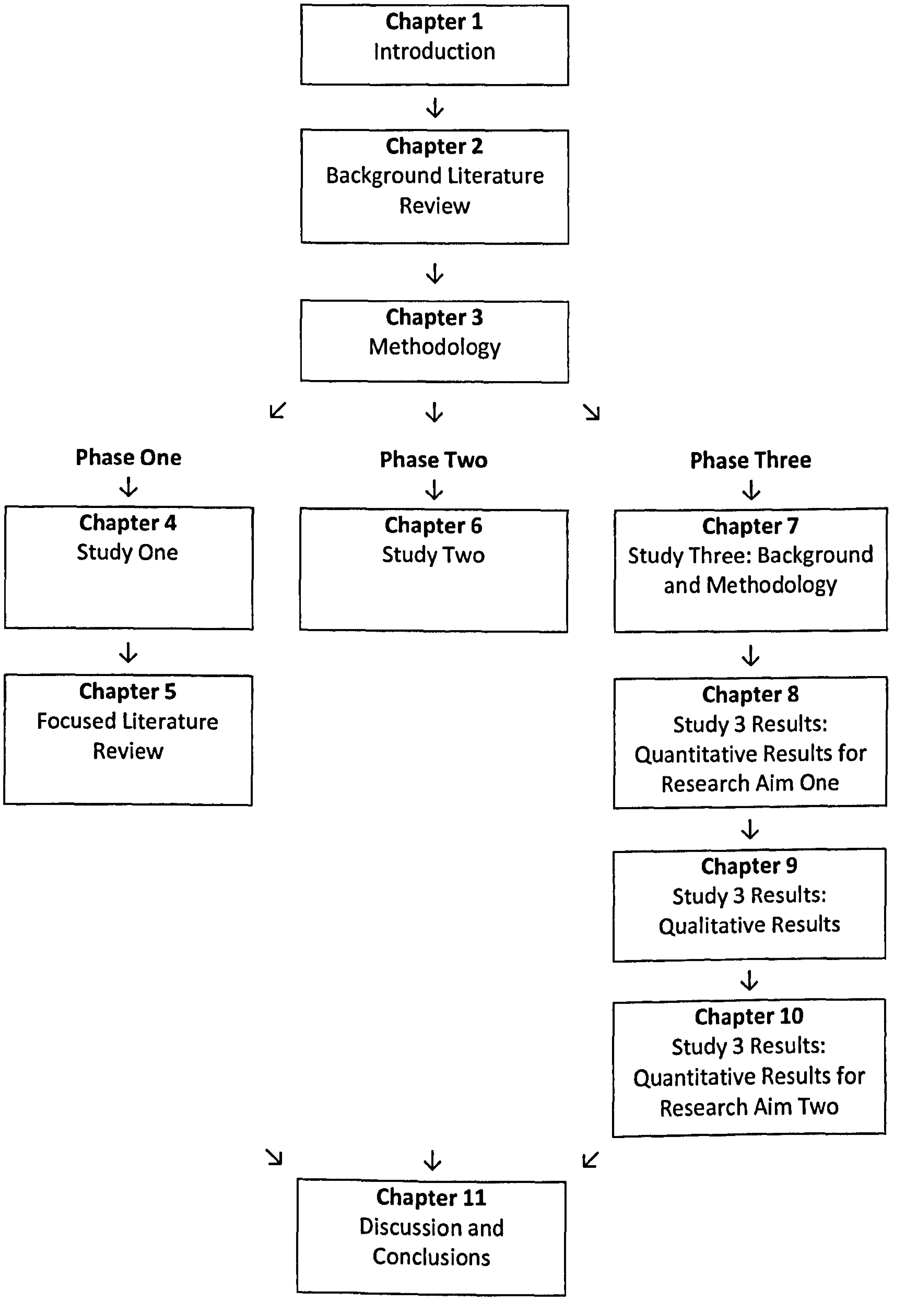

Figure 1.1 Thesis structure

Chapters four to ten cover data collection, analysis, and results of the research phases. Specifically, chapter four presents the first study in phase one, which was a qualitative study designed to explore the important factors underlying expatriate assignment success from the perspective of British employees with experience of expatriate assignments. Chapter five then presents a second literature review focused on the factors identified in phase one. From this review, an initial model of British expatriate assignment success is developed. The results from phase one also highlighted the importance of expatriate personality and assessment, which initiated the second objective of this thesis: to develop a new assessment instrument for expatriate personality. Chapter six covers this second phase, which was a quantitative study, designed to initially develop and test a new expatriate personality instrument on a sample of British employees.

Chapter seven covers the final phase of the research and provides information on the methodology and research questions posed in the third study. Study three has an embedded design that entails quantitative questions for: (i) testing part of the model of British expatriate assignment success; and (ii) for the psychometric assessment of the new expatriate personality instrument. Qualitative questions were embedded to provide further evidence and insight into the research findings and for future research. The results for each element of the study are presented separately in chapters eight to ten reflecting the different objectives and data types.

Chapter eleven presents a discussion of the overall research, including a summary of the findings and limitations, which help give rise to future research questions and directions. The chapter then presents the conclusions and contributions the research makes to the field of expatriation and applied psychology.

1. Introduction

1.1 Expatriates and Expatriate Assignments

Traditionally, expatriates have been referred to as individuals who work for a company in a country different from their own for a contracted period of time (Cohen, 1977; Mayerhofer, Hartman, Michelitsch-Riedl, & Kollinger, 2004; Woods, 2003). These assignments were a significant feature during the colonial era, when military, professional, administrative and managerial personnel (frequently accompanied by their families) often spent long periods working in the remotest locations of the British Empire (Hardill & MacDonald, 1998). Today, the increase in internationalisation and globalisation has resulted in more employees than ever before being sent on overseas assignments (Hechanova, Beehr, & Christiansen, 2003). In a recent global relocation survey (GMAC Global Relocation Services, 2008) statistics revealed that 67% of respondent organisations increased the number of their expatriate assignments over the previous 12 months, with 58% of these organisations deploying more than 100 expatriate employees. The same survey also found that the number of expatriate assignments is expected to increase in future (GMAC, 2008) signifying the importance of these organisational practices.

Today, there are various forms of international assignments used by organisations that can be defined as expatriate assignments (Harris, 1999; Petrovic, 2000). Therefore, it is important to define clearly how expatriates and expatriate assignments are presently conceptualised. Harris (1999) and Petrovic (2000) examined trends in international assignments and identified four different types of expatriate assignments, ranging from short-stay to long-stay relocations. Frequent flyer assignments are the shortest assignments, which involve employees undertaking frequent international business trips without relocating their residency. Assignments such as these have also been labelled as flexpatriate assignments in the research literature (e.g. Mayerhofer, et al., 2004). International commuter assignments involve the employee commuting from their home country to another country where they work, usually on a bi-weekly or weekly basis, while the worker's family remains in the home country. The third form of international assignment is the short-term assignment, which involves the employee (and sometimes the family) relocating to a foreign country for less than one year. Finally, the lengthiest type of international assignment is termed the expatriate assignment. This type of assignment involves the employee and family relocating to a host country for a designated period of time, typically more than one year. These assignments can last for several years, and various terms have been used to describe the employee who engages in such assignments (e.g. expatriate, inpatriate, transpatriate, or repatriate depending on the direction of the personnel transfer, see Yang, 2007). This thesis focuses only on longer-term expatriate assignments (i.e. one year or longer) as the associated benefits and costs can have the most significant impact on the success of an organisation.

1.2 The Importance of Expatriate Assignments and Expatriation Research

Today's highly competitive business environments means that many organisations need to send their employees on expatriate assignments in order to survive. In the UK, some of the main reasons underlying expatriate assignments include setting up a new operation, filling a skills gap, or developing international management skills (Tungli & Peiperl, 2009). When an assignment is successful, the organisation as a whole can reap numerous rewards and benefits. The expatriated employee can acquire knowledge and skills that can contribute to the overall success of the organisation, the most significant of which being the organisation's survival. Additional employee benefits include the expatriated employee (and their family) having the opportunity experience life in another country, the potential to learn a new language, and receiving substantial financial packages. Expatriates and their families may experience a significant rise in their socio-economic status and quality of life that would not have been possible in their home country. Expatriate assignments can also provide significant opportunities for career development. Individuals can gain from the "boundaryless career" opportunities that are afforded by the international experience (Stahl, Miller, & Tung, 2002). This is cited as one of the key reasons why individuals decide to accept expatriate assignments (e.g. Black, Gregersen, Mendenhalll, & Stroh, 1999).

National expertise can be built via inter-firm networks, and industry and regional groupings (Saxenian, 1996). Through these networks, benefits can occur between organisations that help establish competitive advantages for industries at national levels (Inkson, Arthur, Pringle, & Barry, 1997). In addition, expatriated employees can shift more easily between jobs and organisations. Through the movement of these employees, the transference of knowledge and skills can be accomplished both internally and between organisations (Inkson, et al., 1997). At the national level, these expatriates and repatriates not only become local trades of expertise, but they also become importers and exporters to society - an outcome regarded by some as the most prized resource of all (Inkson, et al., 1997).

Expatriate assignments have the potential to bring valuable benefits to numerous parties. However, expatriate assignments involve considerable costs and resources. If an assignment fails, these costs can be even greater, and are considered much more severe than the costs associated with failure in domestic business (Brewster & Scullion, 1997; Scullion, 1992, 1994). Direct costs of assignments include outlay for training, transfer, housing and additional amenities (McDonald, 1993), and high salaries to attract 'good' individuals to work outside their own country in the first place (Suutari & Tornikoski, 2001). These irretrievable costs are known as sunk costs, and estimates per assignment are approximately two to three times the equivalent salary in the home country (Palthe, 2004). Average costs for failed expatriate assignments fall in the region of $1m USD for a single expatriate (Shaffer & Harrison, 1998), and a total cost of $2 billion for American companies per year (Copeland & Griggs, 1985). Such financial costs highlight the significance of expatriate assignment failures (Clegg & Gray, 2002) and the important of trying to reduce the number of failed assignments.

There are also indirect costs associated with failed assignments (Hechanova, et al., 2003; McDonald, 1993; Stierle, van Dick, & Wagner, 2002). These include negative organisational outcomes such as delayed productivity, negative perceptions of the company (Stierle, et al., 2002) and problems for expatriate successors (Bennett, Aston, & Colquhoun, 2000). Expatriate assignment failure can even result in the failure to attract top candidates for these overseas positions (Black & Gregersen, 1990). Typically, the employees who go on expatriate assignments are those who perform highly in the home country (Harvey, Speier, & Novecevic, 2001). As a result of sending high performing employees, the parent organisation may diminish their domestic performance. There can also be significant opportunity costs associated with expatriate failure (Harrison, Chadwick, & Scales, 1996). Relations with customers, employees, communities, suppliers (Porter & Tansky, 1999), and foreign governments (Stierle, et al., 2002) can be damaged, which may take years to repair (Porter & Tansky, 1999). This may affect an organisation's corporate image and competitive position (Shaffer & Harrison, 1998), and damage its market shares (Dowling, 1986), which can leave the organisation in a worse position than before the assignment.

At the individual level, expatriate employees can face difficulties and costs as a result of assignment failures. General obstacles include coping with differences in health care, schooling, education, language, customs, work ethics, and cuisine (Mendenhall, Dunbar, & Oddou, 1987). Employees may also suffer serious psychological consequences as a result of failures (Tung, 1988), such as loss of self-esteem, prestige among peers, self-confidence, and reduced motivation (Hechanova, et al., 2003; McDonald, 1993; Mendenhall & Oddou, 1985; Takeuchi, Yun, & Tesluk, 2002). The impact of these psychological consequences may also be felt by the expatriate's family (Schneider & Asakawa, 1995), going beyond the organisational boundaries and impacting on the expatriate's home life (e.g. Harris, 1989).

Approximately 16-40% US expatriates return home prematurely (e.g. Vance & Paik, 2002; Wan, et al., 2003) and 5-10% of non-US expatriates (Dowling, Welch, & Schuler, 1999). In Britain, an estimated 1 in 7 expatriate assignments fail (Shackleton & Newell, 1997). Although the accuracy of these figure are debated (e.g. Harzing, 1995), in light of the costs highlighted, any expatriate assignment failures within an organisation are costly, and research to help reduce failures is warranted.

Expatriate assignment failure has been conceptualised in a number of ways and differs depending the stakeholder perspective. For example, there are differences between how academics and organisations view expatriate assignment failure and success. This issue will be discussed in more detail later in the thesis (see Section 5.2), but the current thesis attempts to incorporate multiple perspectives in order to provide insightful results for multiple stakeholders (i.e. the academic, the organisation, and the individual expatriate).

1.3 The Importance of Non-US Expatriation Research

Within the field of psychology, psychologists have attempted to understand the ways in which humans think, feel, and behave. An extensive corpus of literature has been developed attempting to understand these psychological processes used to carry out various tasks. Many psychological processes and phenomena can be seen to occur across cultures, but many have been found to have distinct differences between countries and cultures (see Norenzayan & Heine, 2005 for a review). According to Heine (2010), psychologists today understand that much of what humans think, feel and behave has occurred because of the cultural experiences exposed to when developing. When conducting any psychological research, it is therefore important to acknowledge these influences and empirically investigate the extent to which phenomena can be generalised across various nationalities. This section explores the issue in more detail within the context of expatriation, and introduces the importance of conducting more expatriate research on nationalities different from the dominant North American perspective.

Most research conducted on expatriation has been done in the US, using American employee or student samples (Sinangil & Ones, 2001). Psychology researchers agree that theories and findings based on American research should not always be assumed to generalise to other countries (e.g. Deller, 1997; Scullion & Brewster, 2001). The growth in cross-cultural research has signified the importance of acknowledging the significance of diversity between countries (Lehman, Chiu, & Schaller, 2004). Although existing research on expatriation has proved invaluable to understanding and driving research and theory (Scullion & Brewster, 2001), it has resulted in a perspective of expatriation that has been criticised as biased (Harris & Brewster, 1999a; Scullion & Collings, 2006). More research with non-US samples is important to gain a deeper understanding of expatriation and obtain empirical evidence as to the generalisability of existing research findings and theory.

One location advocated for more expatriation research is the continent of Europe (Scullion & Brewster, 2001). Attention has recently been focused on expatriation research in Europe, but it still remains under developed research area (Scullion & Brewster, 2001). In acknowledging the importance of conducting more European expatriation research, it is also essential to recognise the extreme heterogeneity of the continent (Hofstede, 1980; Weinshall, 1977). According to Scullion and Brewster (2001), the EU is more collectivist than the US, and this difference means that generalising US research findings and theories to the EU may not always be appropriate. Similarly, as with the differences between the US and the EU, appreciating cultural diversity between the EU nations is also important as similar inappropriate generalisations can occur. Focusing research on single EU nations could therefore provide a more appropriate insight into developing a deeper and fuller understanding of expatriation. As a result, conducting nationality-specific research on expatriates within a single EU country could produce promising results for the practice of expatriate assignments in that country.

One of the EU's constituent countries is the United Kingdom of Britain and Ireland (UK) and it has one of the longest histories of relocating managers around the globe (Hamill, 1989). Today, expatriates are still relied upon within UK multinational organisations for running foreign operations (Scullion, 1991), often for maintaining trust after acquisitions, for development purposes, (Brewster & Scullion, 1997) to fill a skills gap or developing international management skills (Tungli & Peiperl, 2009). Given the considerable costs of these assignments and the current economic climate, multinational organisations are under increasing pressure to reduce the costs of these assignments (Scullion & Brewster, 2001), whilst increasing their success rates. The significance and continued reliance of these assignments within the UK reflects an area where expatriation research could have a strong application to current business practices. The UK is presently an under-represented nationality in the expatriation research literature, and a number of knowledge gaps exist for this nationality of expatriate.

1.4 Thesis Objective

Expatriate assignments form an important part of today's society. The successes of these assignments are significant with benefits associated with positive and severe costs associated with negative outcomes. Psychological research dedicated to helping reduce failures and improve the success rates of expatriate assignments is important, and academics and organisations alike have exerted a great deal of effort in order to try to reduce expatriate failures. The majority of research and guidance has come from North America, which has biased understanding and limited the application of research findings. Therefore, it is important that research be conducted on non-US expatriate samples. The objective of the present thesis is to explore British expatriate assignment success and extend current knowledge and understanding to assist with expatriate assignments with British employees and organisations.

2. Background Literature Review

This chapter provides a review of existing knowledge on the factors underlying successful expatriate assignments. Much empirical research has been conducted on identifying predictors of expatriate assignment outcomes and as a result, advanced statistical techniques such as meta-analyses have allowed research findings to be combined to develop models of expatriation. The chapter presents an overview of such work before reviewing the British expatriation literature, which identifies the gaps in knowledge and drives the research design and aim of this thesis.

2.1 Expatriate Assignment Outcomes and Predictors: Meta-Analyses and Models

Numerous factors have been proposed as important for contributing to expatriate assignment success. This section will presents various models and attempts to identify what contributes to successful expatriate assignments across the various conceptions of success (see Section 5.2). For example, an early conceptualisation of expatriate assignment success was leaving the assignment early. A conceptual model of expatriate turnover was proposed by Naumann (1992), which contains three categories of predictor variables including worker characteristics, job/task characteristics, and organisation characteristics. Worker characteristics included technical competence, education, and expectations held about the assignment, while job/work characteristics included role ambiguity, skills variety and autonomy. Naumann also proposed that an organisation's structure, culture, and expatriate training programmes were important organisation characteristics. These three groups of predictors were proposed to influence expatriates' attitudes such as job satisfaction, commitment to the organisation, and involvement in the achievement of the organisation goals. Naumann suggested that these attitudes are moderated by expatriates' perceptions of their career paths as a result of being on an expatriate assignment, by the expatriate's level of adjustment, characteristics of the destination country, and the expatriate's family. Naumann developed this model based on empirical research primarily on domestic turnover. It has not been tested empirically and would require very large samples to validate its structure. Nevertheless, the model provided some direction for empirical research and many studies have now been conducted exploring relationships between the various predictor and outcomes variables.

Advancement of analytical methods and a surge of research into expatriation allowed research to culminate these various primary empirical studies in order to develop and test models for expatriate assignment success outcomes. Hechanova-Alampay, Beehr, and Christiansen (2006) conducted a meta-analysis of 42 empirical studies that explored the relationship between predictor variables and expatriate adjustment to the general living conditions and everyday life, interactions with host country nationals (HCNs), and work responsibilities. The predictors explored were categorised into work, environment and family-related factors. On an sample of over 5,000 expatriates, analyses revealed that family-related variables had the strongest relationship with adjustment to general living conditions; frequency of interactions with HCNs had the strongest relationship with interaction adjustment; and job characteristics (e.g. role ambiguity, conflict, and discretion) had the strongest correlations with work adjustment. These results suggest several important aspects of expatriate assignments that facilitate expatriate adjustment.

Empirical studies on expatriate job performance have also been combined and reviewed by meta-analysis. For example, 30 primary studies (N= 4,046) were used in Mol, Born, Willemsen and van der Molen's (2005) meta-analysis on expatriate job performance. The results of this study highlighted the importance of the expatriate's personality in predicting job performance. Specifically, the personality traits of conscientiousness, agreeableness, extraversion and emotional stability were significantly predictive of job performance. Other factors also found to relate to expatriate job performance included local language ability and cultural sensitivity. Mol et al. (2005) referred to the latter variables as contextual factors, and personality variables reflected individual-level factors. Shaffer, Harrison, Gregersen, Black and Ferzandi (2006) also focused on individual-level variables and conducted several studies on factors contributing to expatriate assignment outcomes, which highlighted the importance of the individual for achieving assignment success.

In another meta-analytical review, Hechanova, et al. (2003) explored individual, work-related, environmental, and family-related factors relating to expatriate adjustment (general, interaction, and work). Results suggested that self-efficacy, frequency of interactions with HCNs, and family support were predictive of all three types of adjustment. General adjustment was also predicted by higher interpersonal skills, whereas greater interaction adjustment was related to lower culture novelty. Role ambiguity, conflict and discretion were also found to be strong predictors of work adjustment. These results match later results reported by Hechanova-Alampay, et al (2006), but within this study relationships with other expatriate assignment outcomes of interest were also examined, including job strain, job satisfaction, organisational commitment, performance, and intention to leave the assignment. Through structural equation modelling (SEM) of the meta-analytic data, a new conceptual model of expatriate outcomes could be tested, examining the consequences of these predictors and expatriate employee adjustment. The results revealed a more complex model where the outcome of adjustment used in the earlier study (Hechanova, et al., 2008) could be combined into a newer model. Here, adjustment is statistically related to strain and satisfaction that are in turn related to the other outcomes (see figure 2.1).

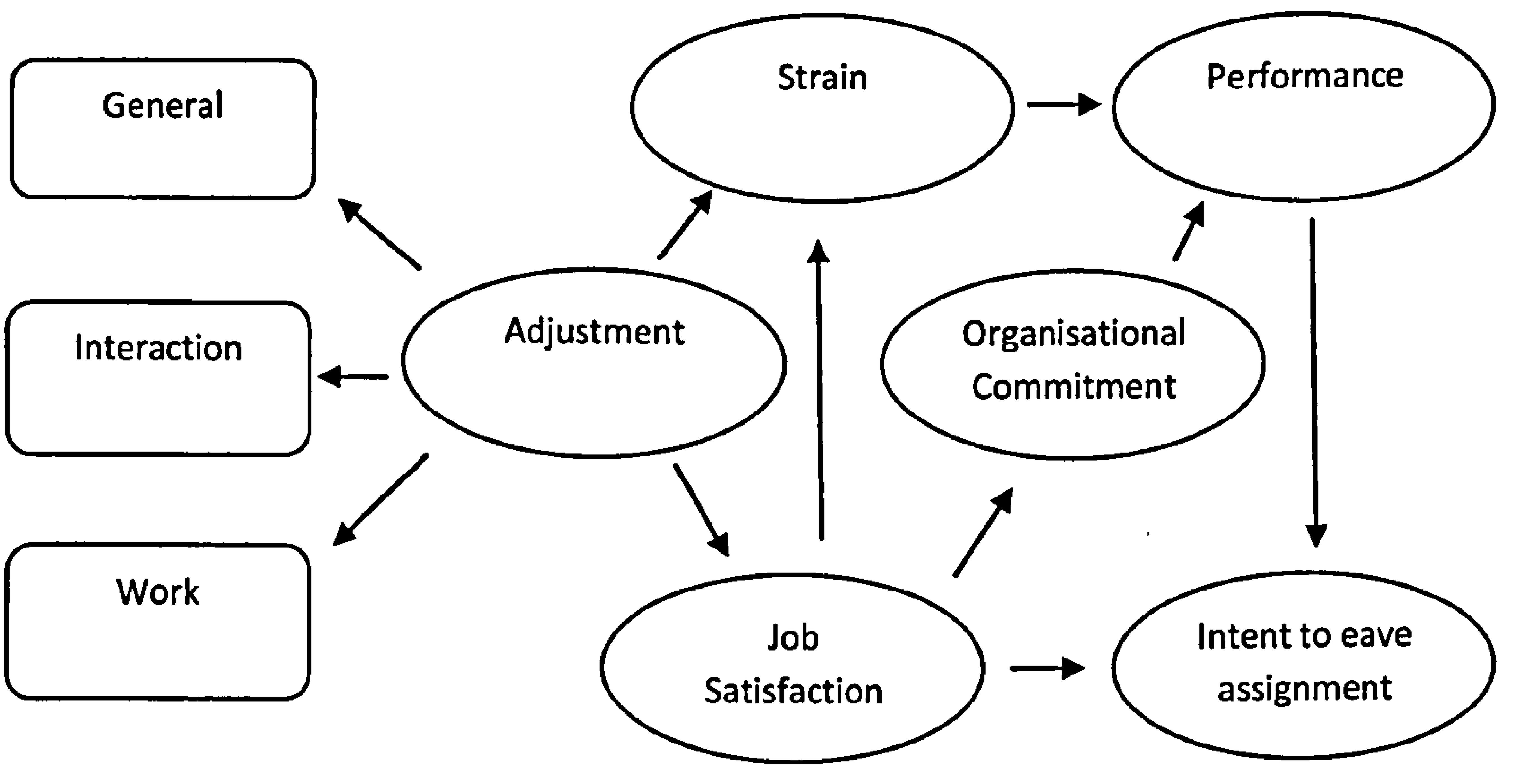

Figure 2.1 Hechanova et al.'s (2003) model of adjustment

(Adapted from Hechanova, et al., 2003, p. 225)

Using a similar methodological approach, Bhaskar-Shrinivas, Harrison, Shaffer and Luk (2005) conducted a meta-analysis of 66 primary empirical expatriate adjustment studies (N=8,474), which explored over 50 predictor variables. These predictors were categorised as in-country variables (i.e. individual, organisational, job-related, non-work variables), and anticipatory variables of adjustment. These were based on Black, Mendenhall and Oddou's (1991) model of expatriate adjustment, but Bhaskar-Shrinivas, et al. extended this model to include additional outcome variables. These included job satisfaction, withdrawal cognitions, and performance (task, relationship, and overall performance). The results highlighted the importance of the five groups of variables in predicting expatriate adjustment, which were then subjected to SEM to test models for the outcome variables. The SEM highlighted that an attitudinal, cognitive, and behavioural strains model best described the relationships between adjustment and the outcomes of interest.

Overall, vast amounts of empirical research have revealed the importance of individual, work-related, contextual and family-related variables in achieving successful expatriate assignments. Researchers acknowledge that even these models may need to be extended further to include additional variables (e.g. Hechanova, et al., 2003). However, existing research provides some evidence-based guidance for practitioners and organisations to follow in order to maximise the successes and minimise the number of failed expatriate assignments. Nevertheless, in general organisations have not made use of research findings to inform practice. This may be due to be a perceived lack of relevance or appropriateness of current research and evidence, which stems largely from the US. For example, almost half of the studies included in Hechanova and colleagues' (2003) meta-analysis had solely North American samples. The issue of generalisability is a concern for both practitioners and researchers. Researchers agree that US theories and findings should not always be assumed to apply to other countries (e.g. Deller, 1997; Scullion & Brewster, 2001). This is important, especially in terms of practical implications of non-US organisations. It is therefore imperative to understand non-US research findings, in particular, British expatriate research.

2.2 British Expatriation Literature Review

A mapping review was carried out to map out and categorise published literature of the on British expatriation and identify gaps in the evidence base (Grant & Booth, 2009). A systematic approach was used to identify relevant studies and a number of sources were used to search for the literature, including online databases (PsycINFO, Business Source Premier (EBSCO), Google Scholar, and Web of Knowledge (ISI)) and examining the references used by other identified relevant papers. This search included papers up to the end of September 2010 and used various search terms and Boolean searches, including "British expat", "UK expat", and various other similar permutations of other key words (e.g. "international assignments"). A low number of relevant empirical articles were found, a number of which did not distinguish between Northern Ireland and Republic of Ireland. Therefore, rather than excluding Irish expatriate literature which may include relevant British expatriate papers (i.e. Northern Irish research), the following review includes a representative selection of the Irish and British research papers to ensure maximum coverage of existing knowledge available to academics and organisations.

2.2.1 Expatriate staffing practices and policies. Most of the British literature on expatriation has examined organisational practices when expatriating British employees and their families. Common areas of research include the reasons for using expatriates, how expatriates are recruited and selected, trained, supported, how performance is appraised, and how repatriation is managed. Issues around career develop and the impact that an expatriate assignment has on the employee's and their spouse's career have also been covered. This section reviews some these areas, providing insight into British expatriate assignment practice used within organisations.

In examining the reasons for using expatriate assignment, the most frequently cited reasons include filling a skills gap, setting up or running a new operation, or developing international management skills within UK organisations (e.g. Tungli & Peiperl, 2009). In terms of the recruitment and selection of employees for expatriate assignments, research has highlighted various selection methods and criteria used by UK organisations. For example, Forster and Johnsen (1996) reviewed 15 UK international organisations and found that the most commonly used selection criteria were technical skills and domestic performance, with informal interviews employed by all organisations. Half of the organisations employed formal interview processes and two used psychometric testing on a selective basis. In a more recent survey (Tungli & Peiperl, 2009), technical skills remained the most common expatriate selection criterion, with interviews (structured) and self-nomination the next most common methods.

Research on the training and support provided to expatriates has typically focused on the types of training used. For example, Forster and Johnsen (1996) found a diverse range of practices across the 15 organisations they sampled. Verbal job previews and written job descriptions were used in all the organisations, with cultural familiarisation training provided in almost all of the organisations optionally. Over half of the organisations provided pre-move visits and written guides to the destination country. However, few organisations provided any additional job-related training. Overall, Forster and Johnsen highlighted the lack of logic or consistency behind the rationales for using different kinds of training. The quality of training provided also varied across the organisations with employee partners seldom incorporated into any training provision. Such variation in quality and level of provision has also been found in other empirical studies within this population (e.g. Monks, Scullion, & Creaner, 2001). Foster (2000) explored the perceptions of expatriates and their partners on the training and support provided by the organisation posting them abroad. The findings suggested that pre-move cultural briefings benefitted the employees and dependents the most, yet they were rarely provided for partners.

Specific organisational practices in relation to expatriate partners and dependents have also been explored. In a study exploring Irish multinational corporations' (MNCs) expatriate practices (Monk, et al., 2001) expatriate families were not greatly attended to in the expatriation selection process or provision of training. Forster and Johnsen (1996) also noted the lack of consideration for the expatriate's family in the expatriation process. In a review of 15 MNCs, only five companies held discussion with employee partners, and this was after the selection decision had been made. Eight organisations provided cultural briefings but none provided assistance for helping the partner find new employment or offer financial assistance in lieu of loss of earnings. However, expatriate financial packages were often financially generous, with guidance and assistance provided for relocating.

Career and development issues have also been discussed within the British expatriate literature. From the perspective of the organisation, the development of internationally experienced managers has been found to be important in UK MNCs. Scullion (1992) also found that UK multinationals were increasing the spending on international management education in a response to the recognition that securing an adequate supply of international managers was important. However, effective programmes to facilitate this goal have been found lacking in many of the UK MNCs sampled in research. For example, Monk et al (2001) found that only 2 of the 11 MNCs examined in their study contained international management development programmes, whilst other organisations reported increased spending on international management education. However, increased education was typically for developing general management competencies as opposed to specific international management competencies.

The British research literature also portrays a number of career concerns for both expatriate employees and accompanying partners or spouses. Forster (1997) explored the effects of an international assignment of the careers of these two groups. For the expatriate, concerns were experienced in relation to job performance, relationships with colleagues and how the new role has influenced family life. However, over time the number of expatriates with these concerns reduced. For the accompanying partner, although many found work in the host country, concerns were noted in terms of how much they liked the new role, how well they were performing, getting along with colleagues and their boss, how well the job fits in with family life, and general concerns about their career as a consequence of moving abroad. Dual-career couples have been noted as a concern for British multinationals as they can often lead to difficulties in the willingness of employees to accept expatriate assignments (Peterson, Napier, & Shim, 1996; Scullion, 1992).

Expatriate performance and appraisals used by organisations have also been examined within the British expatriate research literature. For example, Monks et al.

(2001) found that little systematic attention was paid to expatriate performance and no separate appraisal systems had been introduced for expatriate managers. Similarly, Peterson, et al. (1996) found that although all expatriates had performance appraisals whilst overseas, similar appraisal processes were used across nationalities. These were typically in the same form as the parent headquarters, and annual performance appraisals were conducted by the host country manger and copies sent back to the home country. However, from this study it is unclear to what extent these appraisal processes are uniformly applied across the UK MNCs sampled. In a later study, Peterson, Napier, and Shul-Shim (2000) found that some British MNCs used different appraisal systems in the host country and the home country. Overall, the research literature suggests that expatriate appraisal process experiences and practices may be inconsistent across British MNCs.

Inconsistent expatriate practices are also found between countries. For example, Peterson, et al. (2000) compared the expatriate management practices in 29 MNCs across four different countries by conducting interviews with international HR managers or officials. Five British organisations were included and a number of practices were reviewed, such as expatriate staffing, selection, training, expatriate compensation, and predicted future use of expatriates. Results revealed that there are marked differences between expatriate practices across different countries. Such differences have also been found in other comparative reviews. For example, Tungli and Peiperl (2009) collected information about expatriate management policies used in 136 large MNCs based in the US, Japan, Germany, and the UK. Focusing on similar practices as Peterson et al. (2000), both similarities and differences in expatriate practices were found across these nationalities. For example, training was provided more in the US and Japanese organisations than the UK organisations. However, the UK used significantly more psychological testing as a selection method compared with the other nationalities.

Some research has also commented on national differences in expatriate practices and policies over time. For example, Tungli and Peiperl (2009) compared their results to earlier work by Peterson and colleagues (1996) and Tung (1981, 1982, 1988), and found changes in a number of areas. For example, Tung (1982) found that Japanese and US MNCs provided the least amount of training compared to other nationalities, whereas Tungli and Peiperl (2009) found these nationalities provided the most training compared to Western Europe. Expatriate failures rates for the UK were also slightly higher in Tungli and Peiperl's (2009) review compared to the earlier review of Tung (1982). It should be noted that for these specific results, Tung's (1982) "Western European" group combined the results of different nationalities in Europe, including the UK. In doing so, the differences between the European countries were lost and the specific UK results could not be determined or compared. Nevertheless, these reviews highlight the fact that a universal approach to expatriate management does not exist and the earlier research heavily weighted on US MNC samples cannot necessarily be applied to other countries (Peterson, et al., 2000).

2.2.2 British expatriate living experiences. The living experiences of British expatriates have also been explored empirically. These experiences include general lifestyle and health, as well as aspects related to the expatriate's working life.

2.2.2.1 *Lifestyle and health.* The experiences of British nationals living abroad have been empirically explored in research. For example, Scott (2004, 2006) examined the experiences of skilled British expatriates and migrants living in Paris and developed a typology of six different lifestyles these individuals were living. Three of these types reflected transient relocation lifestyles referred to a Professional British Families and Young British Professionals. These types reflect non-permanent relocations to Paris either for career-related or lifestyle-related motivations (Scott, 2006).

Lifestyles and social activities of British expatriates with other expatriates and HCNs have also been examined. For example, the lifestyles of single British expatriates were explored in an ethnographic study by Walsh (2007), who examined the heterosexual intimacy of single British expatriates living in Dubai, while Willis and Yeoh (2007) explored the relations and gender roles of single British migrants living in China. Several papers have explored socialising and network activities of British expatriates. Harvey (2008a, 2008b) studied the social networks of British and Indian scientists living in Boston, USA. Harvey (2008a) argued that although social networks of highly skilled expatriates are important (e.g. for securing employment, Harvey, 2008b), British scientists tended not to use expatriate social networks. Harvey proposed a number of reasons why expatriate scientists may or may not participate in expatriate social networks. For example, when the size of the expatriate population and the degree of homogeneity within the expatriate population are larger, participation in social networks is greater. In addition, when the expatriate population holds very different views from the indigenous population, and when there are large annual inflows of expatriates from the same country, there are increased participation in expatriate social networks.

Research has also explored the migration of British expatriates in specified business sectors. Beaverstock (2002) studied the individual British expatriate within the Singaporean financial district to identify the working, social and cultural knowledge networks and practices. Beaverstock found that British expatriates accumulate and transfer financial knowledge into and within the financial district via membership of global-local knowledge networks, which included undertaking business in a social context or social events in a business context. Singaporeans were often not included in expatriate social networks and memberships of clubs formed a vital environment for expatriate socialising.

Within the British expatriate research literature, two studies have explored the health of British expatriates when overseas. An early study by Lyden and Robertson (1970) examined the family health of military personnel posted abroad. The study contained a sample of 505 families and demonstrated that the number of visits to the doctor had an inverse relationship over time, from a very high frequency of visits to the equivalent of twice a year in the last few months of the assignment. The research suggests that it was mainly young women and children who visited the doctor frequently, despite being relatively healthy. Also, the incidences of diseases that occurred appeared to vary seasonally and with academic term times.

More recently, Peppiatt and Byass (1991) reviewed the results of medical examinations from 212 missionaries on leave in the UK. The incidence of various illnesses and diseases were reported, highlighting that malaria was the most common illness overseas, followed by diarrhoea, anxiety, depression, and giardiasis. The study highlighted the importance of both physical and psychological examination of individuals working overseas to ensure their health. This finding was echoed by Forster (1997), who measured the psychological health of expatriate employees over the first four months of the relocation. The results suggested that all expatriates experienced higher levels of stress during the initial stages of the move and expatriate spouses had consistently higher stress levels than the expatriate. This study also examined psychological well-being after repatriation, and found that expatriates exhibited lower average levels of general psychological health when compared to non-mobile employees.

Other health-related outcomes that have been empirically examined in the British expatriate research literature include expatriate adjustment and depression. Ward and Kennedy (2001) explored the relationship between coping styles and depression as an indicator of expatriate adjustment. From a sample of 113 British expatriates living in Singapore, results suggested an avoidance coping style, which includes venting of emotions, denial, behavioural and mental disengagement, and an inability to see the potentially positive aspects of change, were positively related to higher levels of depressions. Using humour as a coping style and an approach coping style, which included suppressing competitive activity strategies, planning, and active coping were found to have negative relationships with depression suggesting a positive effect on expatriate psychological adjustment. It should be noted that a portion of the sample (15% of participants) described themselves as migrants (i.e. permanent residents). This represents a different kind of expatriated group, which may have distorted results. Nevertheless, the research highlights that adjustment and health outcomes of British nationals living abroad may be influenced by their individual approaches or styles of behaving.

Differences in expatriate adjustment have also been explored across national groups. Selmer (2001) examined the adjustment of Western European (British, German, and French nationals) and North American expatriates living in China. The results revealed the British managers were reasonably well adjusted in China. More specifically, the study found the within the Western European group, British and German expatriate managers had higher levels of interaction adjustment than the French managers. The results also suggested that Western European expatriates were less socio-culturally adjusted than the North American expatriate group. British expatriates also showed a degree of positive feelings towards living in China as indicated in measures of subjective well-being. In a larger sample, Selmer (1999) conducted a similar comparative adjustment study but this time included Swedish expatriate managers instead of German. Overall, Selmer concluded that there were no significant differences in adjustment between the North American group and the Western Europeans. However, on closer inspection of each nationality, significant differences were found in terms of interaction adjustment, work adjustment, and subjective well-being. These differences are important insights on the adaptability of expatriates from different countries, which may help organisations plan for relocations (Selmer, 1999).

2.2.2.2 Work life. Within the context of work, a number of studies have emerged over the last few decades exploring elements of expatriates' working life. For example, Selmer (1997) gathered data from 240 employees in China on perceived leadership behaviours of host country and expatriate managers. The results suggest that leadership behaviours were not only different between expatriate and host country managers, but that expatriate managers were perceived to demonstrate more leadership behaviours than host country managers. For British expatriate managers, significant differences in this respect were found for the specific leadership behaviours of tolerance of freedom (the extent to which the manager allows others scope to take the initiative, make decisions and act on them), consideration (the extent to which the leader regards the well-being, comfort, status, and contributions of others), representation (the degree to which the leader speaks as the representative of the group), persuasiveness (the extent to which the manager exhibits strong convictions and uses persuasion and argument effectively), and role assumption (the extent to which the leader actively exercises the leadership role and does not surrender leadership to others).

Research by Stening, Everett and Longton (1981) and Everett, Stening and Longton (1982) also found a shared perception of international managers. For example, a group of respondents (N=365) from 34 American, British, Japanese, and Singaporean organisations asked local and expatriate managers to assess four national groups of manager (i.e. their own and other nationality) using a number of paired adjective antonyms. These paired adjectives produced two dimensions of management performance (functional/dysfunctional) and style (open/closed) regardless of nationality. The scores on these dimensions were then used to compute scores for each nationality. The results suggested that British managers regarded themselves as more functional than the other national groups. The Singaporean respondents also perceived the British expatriate colleagues to be very functional. However, when the Singaporeans worked in American organisations they perceived the British colleagues to be low in the functional dimension. The British were regarded as more closed by the other expatriates than they perceive themselves, yet more open by Singaporeans in Japanese and British organisations. Stening et al. (1981) declared that the results suggested a shared stereotype projection model that could be used to compare the different styles and performances of different nationality expatriates.

2.2.3 Perspectives and samples explored. The predominant perspective that has dominated the British expatriate research has been that of the organisation. Specifically, HR managers or similar have provided their views on expatriate practices (e.g. Forster, 2000a; Forster & Johnsen, 1996; Johnston, 1991; Monks, et al., 2001; Peterson, et al., 1996; Peterson, et al., 2000; Scullion, 1992; Tungli & Peiperl, 2009) although there are some exceptions that include other non-HR views (e.g. Forster, 1997; Peterson, et al., 2000). Whilst this organisational-level information is important, it is not the only view that is important to consider. Understanding individual expatriate experiences are also important, and according to Richardson and McKenna (2006) exploring such views contributes to a more "emic" understanding of expatriation. A number of researchers have attempted to contribute to this individual-level perspective and have examined different British expatriate population samples. These have predominantly included the perspectives of the academic expatriate, the expatriated child, and the female expatriate.

2.2.3.1 Academics. A notable proportion of the British expatriate research literature has investigated academic expatriates. Expatriate academics are recognised as a self-selecting expatriate group (Richardson & McKenna, 2000). Richardson and McKenna (2000) interviewed 30 British expatriate academics and designed a typology of expatriate experiences. The researchers described each type in terms of an analogy, which included the academic as "explorer", "refugee", "outsider", and "tightrope walker". The explorer was an academic who saw expatriation as an opportunity to discover, whilst the outsider academic was an individual who chose to expatriate as a way of escaping. The outsider is someone who did not choose to relocate because of a motivation to live abroad, whereas the tightrope walker is an academic whose appointment has a high degree of insecurity or precariousness.

Incentives for British academics to relocate have been examined empirically. Richardson and Mallon (2005) interviewed 30 British academics relocating to various countries. The results revealed that this sample of expatriates decided to relocate because of a desire to travel or experience an adventure, to change their lives, for enhanced financial rewards, and/or to enhance career opportunities. The expatriate's family also played a role in the decision, including dependents and any extended family. These findings were supported by another study of British academic expatriates (Richardson, 2006), which found that family played a significant role in the decision to relocate. This included spouses and children, as well as the extended family who would remain in the home country. Richardson concluded that the expatriate career choice in academics hinged on personal relationships.

Other research (Richardson & Zikic, 2007) has explored the expatriate academic decision to relocate abroad temporarily. Interviews with 30 British expatriates explored decisions to go abroad, the experience of the position, and their reflections. Results were discussed in relation to transience and risk, which highlighted some of the darker sides of an international academic career. For example, moving abroad was seen as a chance to explore and try something different. However, the participants noted the loss of familiar social relationships and the problems associated with this transient experience (e.g. feeling like an outsider). All academics were aware of the risks involved in the decision to pursue an international career, which centred on three main issues. The first issues related to the risk that international experiences would not be recognised or rewarded, which had implications for career development and employability. This related to the second issue, which surrounded job security and stability. The third issue related to the risks to the spouses/partners' career, as they may experience difficulties with finding suitable employment. Consequently, this may cause conflict and affect financial stability. Some coping strategies were also highlighted in the study, which included being prepared, having contingency plans, and taking regular trips home as useful strategies to adopt.

The socialising and network activities of British expatriate academics have also been examined (see Section 2.2.2.1). This research revealed that social networks were important for securing employment (Harvey, 2008b), but typically British academics do not use expatriate social networks. Richardson and McKenna (2000, 2006) revealed relationships with expatriated academic's home and host country appeared to be influenced by family and friends in Britain, visiting Britain, official status in the host country, the feelings of "outsiderness", and intentions to return to Britain.

2.2.3.2 Children. Investigation into British expatriate children (also referred to as "Third Culture Kids", Lam & Selmer, 2004a) has also been explored in several studies. In an early study by Bond and Hewstone (1988), differences between British expatriate and local Chinese high school age children were seen in relation to identification with the ingroup, intergroup differentiation, resistance to change, and satisfaction with the status quo. British children believed they were more threatened by political change and wanted change much less than the Chinese group. These results suggested differences between nationalities and highlight national differences in younger age groups as well as adults.

Some researchers have explored the differences and international mobility preferences of children who have experience of the expatriate lifestyle compared to those who have not lived abroad. On a sample of British adolescent children living in Hong Kong (n=63), (Lam & Selmer, 2004a, 2004b; Selmer & Lam, 2002) these expatriate children were different in terms of characteristics and international mobility preferences over British children living in the UK (n=88). Analyses suggested that British expatriate children had different and distinct characteristics, in terms of stronger acceptance of cultural differences and foreign languages, an enjoyment of foreign travel, stronger family relationships, and future orientation. These children perceived themselves as more international and showed a greater preference for international mobility in the future. The international experience, the second language, parental and institutional education, the child's level of neutrality, open-mindedness, flexibility, attitudes towards other systems and cultures, respect and tolerance for others behaviours and views were all found to be statistically related to this view of being international. This led the researchers to propose this group of children as ideal potential expatriate employees in the future.

2.2.3.3 Women. The perspectives of British women living abroad have also been empirically explored. Forster (1999) conducted a 2-year longitudinal study following the experiences of 92 women across 36 organisations. The results suggested that the number of women choosing to be posted overseas is increasing. Most of the sample had adapted well to the assignment and viewed the assignment as career enhancing. All of the expatriates experienced higher levels of stress during the early stages of the assignment, but none appeared to suffer any extreme levels of distress. Expatriate assignment failure was also low for this sample with only two women returning home early. Forster also noted a "glass ceiling" for women expatriates for two reasons. Firstly, most of these women were junior or middle management positions, and second because there was less choice of destination country due to the cultural prejudices and gender roles that exist within some host countries.

The selection of women for expatriate assignment posts has also been explored. For example, Harris (2002) interviewed 6 women with expatriate experience to explore why fewer women are used in expatriate assignments relative to men. Results suggested that lack of career planning and personal concerns on their part may contribute. Interestingly, lack of support and flexible expatriation packages for dual-career couples did not appear to present a significant barrier for women being posted abroad. Prejudice from host country nationals did not appear to be a problem from the perspective of the female expatriates, which was contradictory to the perception by organisations. Instead, these women felt that acceptance from other expatriates was more of an issue than HCN issues.

2.3 British Expatriate Assignment Success: Gaps in Knowledge

The research literature on British expatriation has focused on a number of areas, samples and perspectives. However, compared to the amount of research from the US, British expatriation is significantly under-researched. In terms of what factors actually contribute to a British expatriate being successful, the only empirical data available comes from the perspective of the organisation. Tung (1988) investigated the human resource management practices in five multinational organisations and derived three common reasons for expatriate assignment successes. The first was the importance attached to these international assignments, as they are often considered an essential step in career development and promotion. Second, support systems were geared toward managing any repatriation problems. Third, the quality of employees sent abroad was considered a main reason for successful assignments, which usually involved selecting only the top employees. Other reasons were also noted, which included using short assignment durations to desirable locations, having comprehensive preparatory programmes, and having a higher tolerance for lowered performance by expatriates during the early phases of the relocation. These results are insightful, but have not been empirically examined on a sample of British expatriates to determine whether they can predict expatriate assignment outcomes.

From the samples and perspectives explored in the research, the British expatriated employee perspective is notably absent. This is important as different perspectives may produce different results. For example, important expatriate selection criteria have been shown to vary depending on whether it was from the perspective of the employer or the employee (UMIST, 1995, cited in Franke & Nicholson, 2002). Nationality has also been found to influence the ranked importance of selection factors (Franke & Nicholson, 2002). Noting this, whilst Tung's (1988) results are important, they only reflect one perspective, which are now over two decades old. It is not known which (if any) of these factors are important for predicting expatriate assignment success outcomes. Neither is it known what factors contribute to a successful expatriate assignment from the expatriate's perspective. Brewster and Scullion (1997) noted the importance of exploring different perspectives, especially that of the expatriated employee. Given the problems of generalising models from one culture to another, exploring the important factors for British expatriate assignment success is an important area for research.

2.4 Research Aim One

Overall, there has been a substantial amount of empirical research exploring factors that contribute to a successful expatriate assignment. These studies have been combined in meta-analyses that have helped to produce a number of theoretical models of expatriation. However, much of the research has been conducted on US samples, which may not be generalisable to other cultures. Conducting expatriate research on other nationalities helps to increase understanding of expatriation, and Europe represents an important gap in the research literature. In particular, expatriation research within the UK is an under-researched area, despite the strong use of expatriate assignments by British organisations. A significant research gap exists in terms of the factors that contribute to British expatriate assignment success. This thesis addresses that research gap by exploring factors that contribute to successful expatriate assignments from the perspective of the British expatriated employee.

3. Methodology

3.1 Theoretical Approach

Throughout the history of science, there have been philosophical debates regarding the paradigms[1] and their associated method(s). Guba and Lincoln (1989) proposed a tripartite framework that has been employed by many researchers to convey theoretical and methodological approaches to research. The framework asserts that a researcher's alliance to an ontology (view of reality), dictates their epistemological position (the nature of truth) and in turn, the research methodology to be applied. This framework proposes two ontological positions: positivism and social constructivism. Within the positivistic position, a quantitative method was necessary, whereas the social constructivist position required a qualitative method. According to the framework, these positions are paradigmatically opposed and, as a result, create an incommensurable distinction between quantitative and qualitative research (Morgan, 2007). In other words, a researcher could be either a quantitative researcher or a qualitative researcher, not both. Guba and Lincoln's (1989) "social constructivist" framework provided philosophical justifications for qualitative researchers who do not believe that all scientific research must be conducted quantitatively. With a strengthened case for scientific qualitative research, a broader range of research questions were made possible by the framework, which has benefited the field of social science. However, various limitations or

[1] The term *paradigm* has been defined in various ways by different groups of researchers. This has led to various understandings and interpretations of the concept and what it represents. Although not the focus of the present discussion, it is important to be aware of these variations and the role they play in ongoing debates (The reader is referred to Morgan (2007) for a more comprehensive discussion of this matter).

anomalies[2] are now acknowledged with the tripartite framework. For example, the definitions and boundaries of these paradigmatic positions are viewed by many social scientists as largely arbitrary (Johnson, Onwuegbuzie, & Turner, 2007; Morgan, 2007). The distinctions were derived primarily on misrepresentations or misunderstandings of the proposed ontological and epistemological positions (see Shadish, 1995). Many researchers have argued that the division between qualitative and quantitative methodology is no longer helpful or necessary to today's researchers (Howe, 1988, 1992, Johnson & Onwuegbuzie, 2004; Johnson, et al., 2007; Onwuegbuzie & Johnson, 2006; Schwandt, 2000, 2006). As stated by Reichardt and Cook (1979), "there was no reason for researchers to be constrained to either one of the traditional, though largely arbitrary, paradigms when they can have the best from both" (pp. 18-19).

Many social scientists today endorse a theoretical position that emphasises a move forward from such philosophical debates, and instead focuses on finding the most appropriate and functional method to answer research questions (Morgan, 2007). This theoretical position is called pragmatism. A researcher working under this position believes in using whatever methods are most appropriate to answer research questions and better understand real-world phenomena (Johnson & Onwuegbuzie, 2004). Within an applied discipline such as occupational psychology, approaching research pragmatically not only reflects what occurs in practice more accurately (Johnson & Onwuegbuzie, 2004), but also reflects an important skill for researchers to possess: conducting methodologically rigorous scientific research through practical and cost-effective means.

[2] A term used by Kuhn to signify the beginnings of *paradigm shift* from a dominant paradigm, whereby predictions fail within the existing paradigm or new observations were found to be incompatible (see Morgan, 2007).

The present research was conducted in line with this pragmatic philosophical position. In particular, a realist-pragmatist position (Rescher, 2005) was adopted that allowed a unidirectional relationship between meaning, experience and language to be assumed (Potter & Wetherall, 1987; Widdicombe & Wooffitt, 1995, cited in Braun & Clarke, 2006). The realist position is typically adopted for most psychological research (Wilkinson, 2008) as individuals' personal ideas, opinions and understandings can be theorised about in a relatively straightforward way (Braun & Clarke, 2006). According to Rescher (2005), a realist position is the most pragmatic philosophical position to conduct applied research. Through this pragmatic position, the research could adopt an eclectic approach and capitalise on the benefits of both qualitative and quantitative approaches (Johnson & Onwuegbuzie, 2004). The advantage of this, as noted by Johnson and Onwuegbuzie (2004), is the potential to produce "superior research" (p. 14). Therefore, previously ritualised philosophising is left to "the province of philosophers" (Morgan, 2007, p. 68) and the approaches and assumptions of the present research are aimed at achieving the best and most workable results (Johnson & Onwuegbuzie, 2004) for organisations who use expatriate assignments and help reduce the gap between research and practice. The following sections outline how the thesis was conducted within this theoretical approach.

3.2 Methodological Approach

The present research used a mixed methods approach. Mixed methods research (also called blended research, (Thomas, 2003), integrative research (Johnson & Onwuegbuzie, 2004), multiple methods (Smith, 2006), and multimethod research (e.g. Morse, 2003) collects, analyses, and mixes both quantitative and qualitative data in either a single study or series of studies to provide a better understanding of research problems than using a single methodology (Creswell & Plano Clark, 2007). The method reflects a pragmatic approach to research as it provides the researcher with the opportunity of finding the best and most workable solution to proposed research questions (Johnson & Onwuegbuzie, 2004). Through using both quantitative and qualitative methodologies, the present research derived a comprehensive account of important factors that contribute to expatriate assignment success in British expatriate employees, which is not currently available in the empirical research literature.

A sequential mixed methods design (Creswell & Plano Clarke, 2007) was employed, which comprised three phases. The sequential phases are driven from the results of the previous phases, and use a complimentary blend of mixed methods designs to collect the necessary information to meet the research aims and answer the research questions posed throughout the thesis. The following section describes each phase of the research and outlines the rationales behind each study, as well as the rationales for the methods deemed most appropriate for these steps. The phases of the research are displayed graphically in figure 3.1.

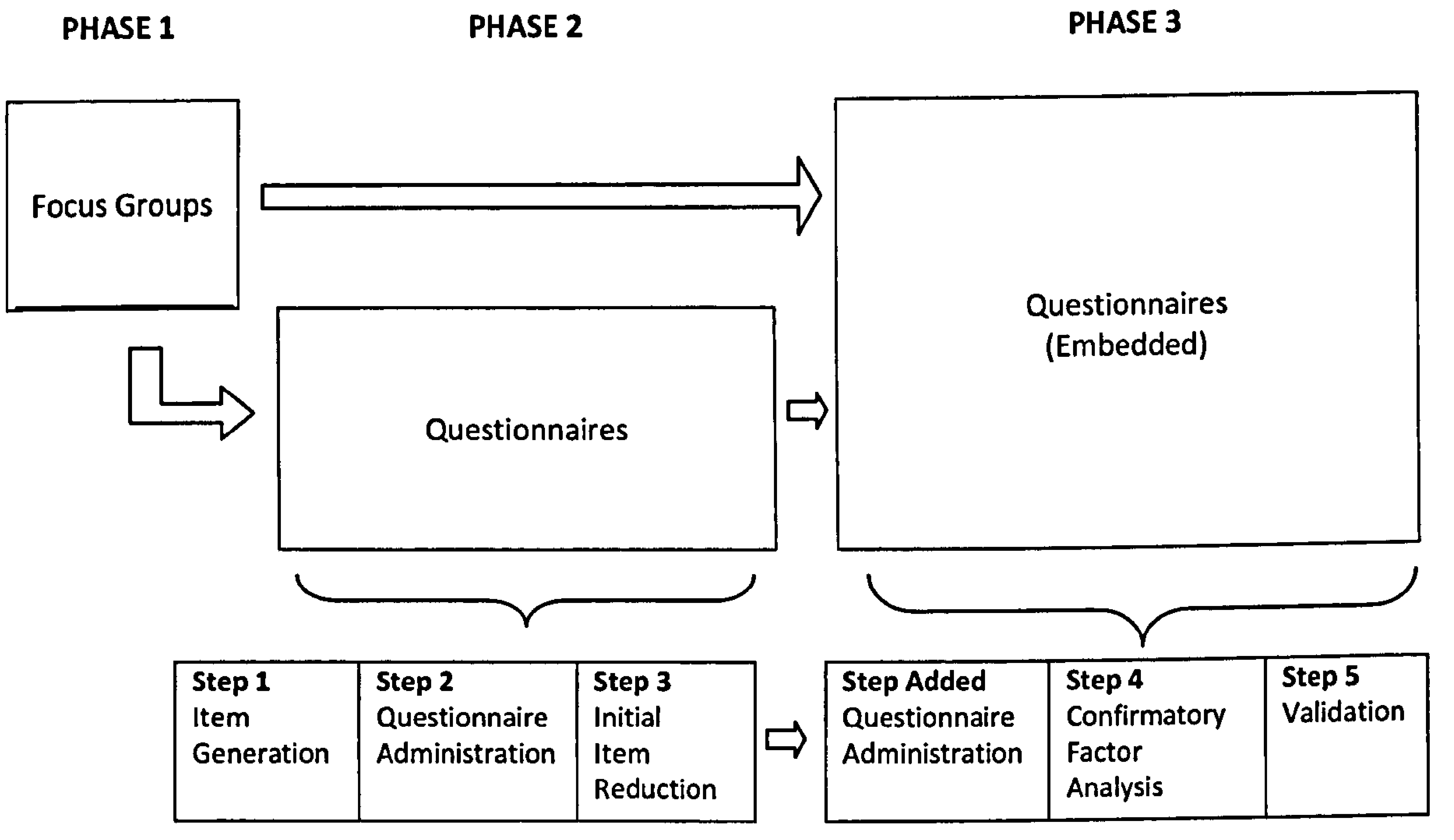

Figure 3.1 The sequential mixed methods approach of the thesis

(Adapted from Creswell & Plano Clarke, 2007, p. 53; Hinkin, 1998, p. 106)

3.2.1 Phase one. The first phase of the research was a qualitative exploration of the factors that can influence expatriate assignment success from the perspective of the British expatriate employee. The previous chapter illustrated that although the amount of expatriate research in Britain is growing there is currently no research that presents the factors that contribute to a successful expatriate assignment within a British expatriate population. Therefore, a qualitative research approach permitted an in-depth exploration of situations in which data originated from this population and allowed the researcher to gain sufficient understanding of the situation from participants' first-hand experiences (Dhar, Bhagat, & Dhar, 2008).

The focus groups method was employed for the first study of the thesis as it provided a pragmatic method of collecting large amounts of data quickly and cheaply (Wilkinson, 2008). Each focus group lasted for approximately one hour and the sizes of the groups varied between two and seven. Keeping groups small helped the moderator facilitate discussions between all members. Focus groups were conducted until no more new information was being revealed (i.e. a theoretical saturation point was reached, Flick, 1998). Digital recordings were made of the focus groups, which were subsequently transcribed verbatim and subjected to inductive thematic analysis. By sampling British employees who had been and returned from an expatriate assignment, direct first-hand experiences and information were collected. This conquers some of the noted limitations of research that merely considers the perspectives of organisations or managers (Brewster & Scullion, 1997), and allows lessons to be learnt from other important stakeholders in the expatriation process.

The results of study 1 provided preliminary empirical evidence of key factors for British employee expatriate success. Several factors were highlighted as important and tentative hypotheses could be generated for the relationships between these factors and expatriate assignment outcomes. The focus groups also revealed a new variable for investigation, which warranted further investigation. A secondary study was necessary to assess the validity of these factors on a larger sample. This was that rationale underlying study 3 (see Section 3.2.3).

3.2.2 Phase two. The results phase one highlighted the importance of the expatriated employee's personality, and that of their accompanying partner or spouse. Selecting employees to be expatriated using a personality criterion is one of the main methods proposed by academics as important for organisations to adopt within selection processes (Caliguiri, Tarique, & Jacobs, 2009). It is through inappropriate selection that many assignments are thought to fail (see Anderson, 2005). However, often psychological tests for selection purposes are not used because they are not considered appropriate or applicable, largely due to their US-origin (see Scullion & Collings, 2006). Developing and testing a specific personality measure for British expatriates may help reduce this gap between what is done in practice and what is advocated from researchers. Phase two of the research was included to develop a new personality measure for this expatriate population. The rationale for this phase is discussed in more detail in section 6.1, together with the approach used for developing the scales. This line of investigation represents a secondary aim of the thesis, which attempts to contribute to an existing debate from the selection and assessment context, as well as providing a practical and usable measure for organisations and researchers.

3.2.2.1 The scale development process. The present research adopted the frequently cited scale development guidelines proposed by Hinkin (1998), who advocates a number of steps necessary to produce a psychometrically sound scale (see figure 3.2.).

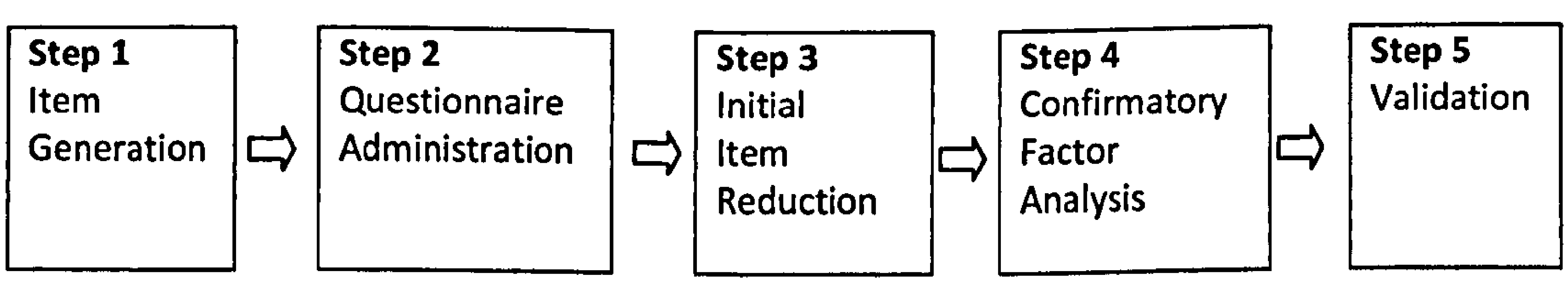

Figure 3.2 Hinkin's (1998) scale development process

(Adapted from Hinkin, 1998, p. 106)

3.2.2.1.1 Step 1: Item generation. The first step in instrument development involves the creation of items to assess the desired constructs. The aim is to generate a sample of items that adequately represents these constructs, therefore careful consideration is required when developing the items at this stage. Items should be simple and short to prevent confusion or misinterpretations by respondents (Hinkin, 1998). Keeping scales short also prevents future respondent fatigue and boredom, which can create response set bias (Schmitt & Stuits, 1985; Schriesheim & Eisenbach, 1995). Similarly, each scale should consist of positively-keyed and negatively-keyed items to help reduce potential response set bias (Price & Mueller, 1986, cited in Hinkin, 1998) and acquiescence (Saucier & Goldberg, 2002). Every item must be carefully checked, and any items deemed inappropriate should be removed. There are no strict rules for the number of items a scale should possess or how many items should be initially generated (Hinkin, 1998). The goal is to produce a parsimonious scale with the minimum number of items needed to reflect adequately the domain of interest (Thurstone, 1947). Harvey, Billings, and Nilan (1985) proposed that a minimum of four items per scale is required in order to assess the degree of homogeneity of items within the construct (important for calculating the degree of internal reliability). Therefore, Hinkin (1998) recommended an overall item retention goal of approximately four to six items per scale. Following this, and given the anticipation that approximately half of the items will be retained after analysis (Hinkin, 1998), a large number of items should initially be developed in accordance with the number of scales that are desired. Hinkin (1998) also recommended adopting a 5-point Likert-type response format. Upon completion of step one, a list of checked items should be ready for initial testing.

3.2.2.1.2 Step 2: Questionnaire administration. The second step of Hinkin's (1998) scale development process is questionnaire development and administration, which includes collecting data on the developed items to facilitate reducing and refining the scales. During this step, items are presented to a sample that is representative of the population of interest. Large samples are required by the statistical techniques that are used in subsequent steps to refine and test the scales (exploratory factor analysis (EFA) and then confirmatory factor analysis (CFA)). Using large samples helps confirm that the factor loadings from these techniques are accurate reflections of what would appear in the population (Hinkin, 1998). The exact sample size required to conduct these analyses is still a debated issue. A minimum of 200 respondents has been proposed as a general rule, but with large numbers of items, larger samples may be required (Hinkins, 1998). Therefore, the sample size must be reflective of the number of items to be tested. At this stage, Hinkin (1998) also suggests including any other relevant established measures in the questionnaire that could provide additional data to assist with the validation of the instrument at step five. On completion of step two, a questionnaire containing the items from step one and any other relevant measures is distributed and responses are collected from a sufficiently large representative sample.

3.2.2.1.3 Step 3: Initial item reduction. The third step is initial item reduction and scale refinement. As mentioned above, a parsimonious scale structure is desirable, and this is achieved using the technique EFA. The number of factors to extract is determined through examining a Scree Plot. The number of factors revealed is then explored by examining the factor loadings of items. Only item loadings that meet a minimum acceptance level are recommended for retention in order to keep only meaningful items in the scale (Ferguson & Cox, 1993; Ford, MacCallum, & Tait, 1986). Items that do not meet the minimum criteria should be removed and the analysis repeated iteratively until a clear factor structure is revealed. Once this is established, the reliability of the scales must then be examined for internal consistency (Gerbing & Anderson, 1988). A commonly accepted measure of internal consistency is Cronbach's alpha (Price & Mueller, 1986, cited in Hinkin, 1998), which is recommended when used in conjunction with factor analysis (Cortina, 1993). Only scales that meet a minimum alpha value should be retained as internal consistency is a necessary psychometric scale property (see Section 3.2.2.2.1). Once initial scales have been produced, they are then ready for further psychometric assessment.

3.2.2.1.4 Step 4: Confirmatory factor analysis. Step four in Hinkin's (1998) process involves confirming the factor structure of the scales revealed from the EFA. To do this, CFA is recommended and again, large samples are required. CFA is used to seek confirmation of the number of proposed factors within each construct of interest, and to examine the fit of individual items to the specified factor or construct. Acceptable model fit levels should be attained in order to be satisfied that the factor structure has been confirmed. Upon meeting proposed criteria, confidence can be assured in the validity and reliability of the scale structure. Once the confirmed factor structure of the scales has been shown, it is ready for further psychometric evaluation.

3.2.2.1.5 Step 5: Validation. The final step in Hinkin's (1998) development process involves the validation of the scales. Validation refers to the process of establishing a justified set of inferences made from a set of scores (Onwuegbuzie, Daniel, & Collins, 2009) and is discussed in more detail in the following section.

3.2.2.2 Psychometric properties: Reliability, validity, and generalisability. For any psychological instrument, it is important that it measures what it claims to, and does so accurately and consistently. These two features refer to the psychometric properties known as validity and reliability. Validity is a broad concept, and can be deconstructed into three forms: content validity, criterion validity and construct validity. Researchers typically aim to provide evidence of one or more of these forms when validating a measure (Hinkin, 1998). The present research addresses all three. The purpose of this section is to clarify these psychometric criteria and illustrate how each is addressed in the present research.

3.2.2.2.1 Reliability. Reliability is an important property for any scale to demonstrate which relates to the internal consistency of a measurement instrument (American Psychological Association (APA), 1995). Internal consistency demonstrates that the items contained within a scale all measure the same construct (Bryant, King, & Smart, 2007). The present research employed Cronbach's alpha to assess scale reliability. At present, there is still no universally agreed standard regarding how low a measurement's level of reliability can be before it is considered untrustworthy (Bryant, et al., 2007). As a result, different psychometricians have proposed different criteria. For example, Kline (1998) suggested that instruments with alpha coefficients below .50 should be avoided, reliabilities of .70 or .80 are adequate and good respectively, and reliabilities of .90 are excellent. An alternative range of reliabilities was suggested by DeVellis (1991) who proposed that reliabilities lower than .60 are unacceptable, between .60-.65 are undesirable, between .65-.70 are minimally acceptable, between .70-.80 are respectable, and between .80-.90 are very good, with alpha coefficients above .90 signifying the need to reduce the number of items within the scale. Many researchers appear to use a .70 alpha coefficient level as a minimum acceptance level for a scale (e.g. Bryant, et al., 2007; Hinkin, 1998; Nunnally, 1978). In keeping with this approach, the present research used the minimum level ($\alpha \geq .70$) to ensure that only internally consistent or reliable scales were retained in the instrument. This is important as an instrument must be reliable if it is to be valid (Kerlinger, 1986).

3.2.2.2.2 Validity. Validity concerns "the extent to which scores generated by an instrument measure the characteristic or variable they are intended to measure for a specific population" (Onwuegbuzie, et al., 2009, p. 200). Validation can be broken down into three forms referred to as content validity, criterion validity, and construct validity. These reflect the instrument's degree of measurement coverage thoroughness, strength of predictive utility, and accuracy of conceptual meaning, respectively (Bryant, et al., 2007). Evidence of these forms of validity can be demonstrated through two approaches: a logical approach, via expert judgements; and an empirical approach, via statistical data (Onwuegbuzie, et al., 2009). The present study uses both approaches and addresses all three forms of validity. Figure 3.3 displays how content validity, criterion validity, and construct validity are considered and assessed in the present research.

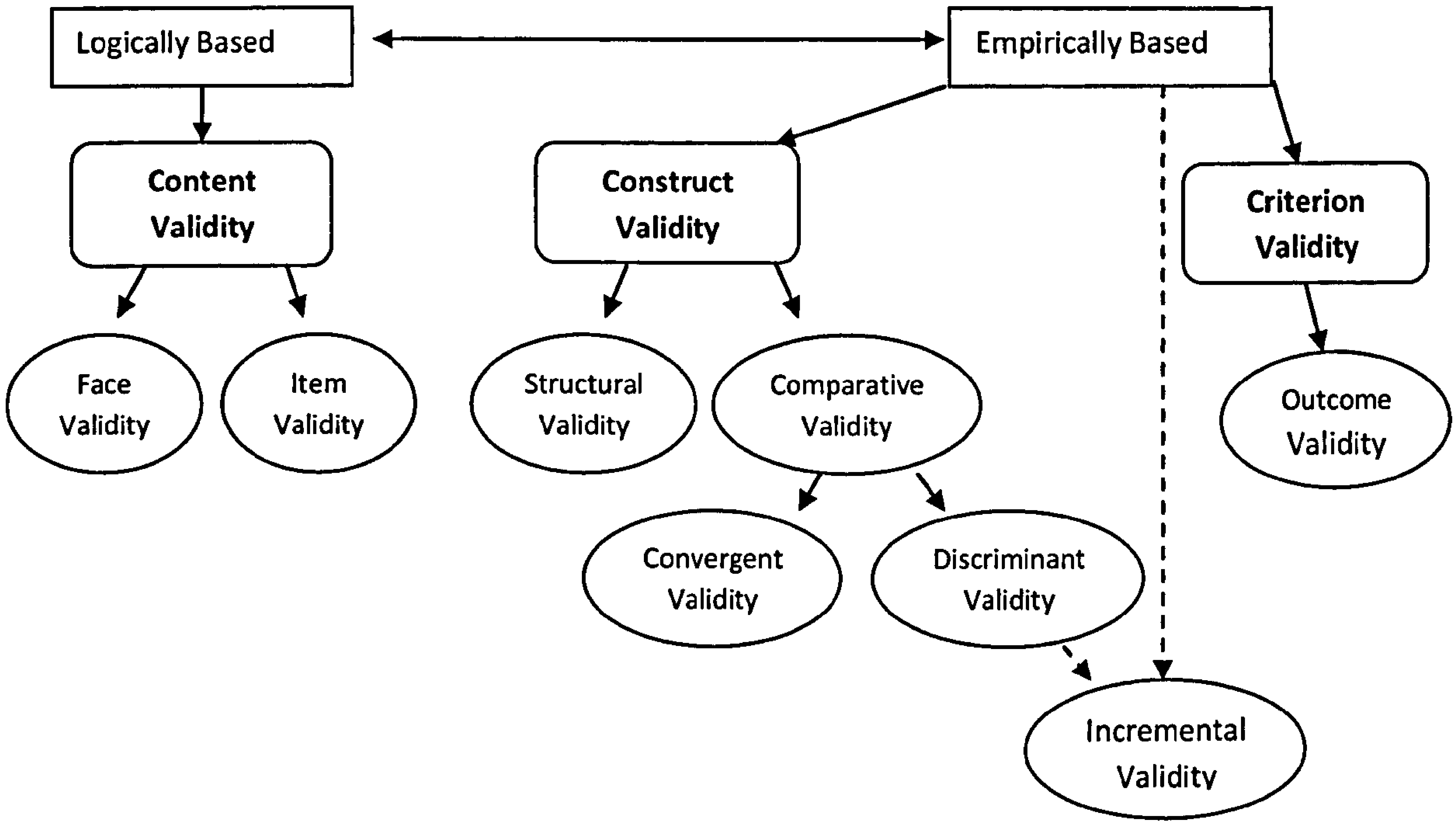

Figure 3.3 Forms of validity examined in the present research

(Adapted from Onwuegbuzie, et al., 2009, p. 204)

Content validity assesses the degree to which items within an instrument represent the construct being measured (Onwuegbuzie, et al., 2009). According to Onwuegbuzie, et al. (2009), content validation typically involves either using experts to examine and evaluate the instrument's content to assess the extent to which the items adequately represent the domain of interest, or providing evidence through demonstrating similarities between item content and a codified representation of the domain of interest (e.g. literature identifying important characteristics for inclusion). The present research uses both of these resources to provide evidence of content validity under the constituents referred to as face validity and item validity.

Face validity relates to the extent to which items within an instrument are relevant, important, and interesting to respondents (Onwuegbuzie, et al., 2009). Both the logical approach and empirical approach were used to demonstrate face validity. Within the logical approach, items for each scale were initially developed by the researcher (using the available literature on the chosen constructs) and then refined by another expert to ensure they were important and relevant. Within the empirical approach, face validity was ensured by assessing the degree of missing data on the items. Low levels of missing data provide support that the items were interesting to respondents (Van der Zee & Van Oudenhoven, 2000) and support the claim of adequate face validity. Both of these approaches were used to provide sufficient evidence of face validity for the instrument.

Closely related to face validity is item validity, which assesses the extent to which the specific items represent the intended construct (Onwuegbuzie, et al., 2009). Like face validity, logical analysis provided support that specific items represented the intended constructs. According to Onwuegbuzie, et al. (2009) using a codified representation of the domain of interest to develop the items (i.e. using the available body of literature available) helps establish item validity for an instrument. The present research used a deductive approach for item generation, an approach strongly grounded in the research literature for the desired constructs. An item assignment exercise was also used to ensure that items were correctly or adequately matched to their respective scale definitions (see Section 6.3.5). This helped produce adequate levels of item and face validity.

Construct validity refers to the extent that an instrument measures the domain of interest (Onwuegbuzie, et al., 2009). Bryant, et al. (2007) noted the inherent challenge of demonstrating this form of validity due the subjective decisions required for determining the meaning and conceptual interpretations of the measurement. Construct validity requires comparisons to be made between different measures of perceived similar and dissimilar constructs, which can involve employing complex techniques to demonstrate the associations (Bryant, et al., 2007). In the present research, construct validity of the instrument is assessed through exploring the degree of structural validity, comparative validity and incremental validity. The latter form of construct validity, incremental validity, also requires the instrument to possess criterion validity. For this reason, incremental validity will be discussed after criterion validity has been addressed.

Structural validity assesses how well the scoring structure of an instrument corresponds to the domain of interest (Onwuegbuzie, et al., 2009). A commonly used empirical approach to assess structural validity is EFA, which determines the underlying composition of scales (Onwuegbuzie, et al., 2009). The present instrument was initially developed through conducting a thorough EFA, which went someway to establishing structural validity. However, it has been suggested that items that load clearly in an EFA could still be deficient in external consistency and demonstrate an insufficient fit in a multiple-indicator measurement model (Gerbing & Anderson, 1988). Therefore, for a more adequate assessment of structural validity of the structure derived from EFA should be sort (Hinkin, 1998). As presented in Section 3.2.2.1., the present research included a step suggested by Hinkin (1998) that addressed this issue specifically (step 4) and CFA was conducted to assess the quality of the factor structure, the significance of the overall model, and the item loadings on the factors. By conducting both these forms of factor analysis, the present research adequately assesses the structural validity of the instrument.

Comparative validity refers to the degree to which other measures and constructs relate to the scales of the instrument in the manner expected (Onwuegbuzie, et al., 2009). This form of validity involves identifying a network of key constructs that are believed to be associated with the concept of interest, and exploring the pattern of expected interrelationships between them[3]. Comparative validity can be divided into two respective forms of validity known as convergent validity and discriminant (or divergent) validity. Convergent validity is concerned with the degree to which the scores generated from the scores are highly correlated with scores from other measures claiming to assess the same construct (Onwuegbuzie, et al., 2009). Discriminant validity is concerned with the degree to which the new scales deviate from measures of related (but different) constructs (Bryant, et al., 2007). According to Onwuegbuzie and colleagues (2009), the scores from the instrument should be slightly but not significantly related to scores from the other measures that measure concepts theoretically and empirically related to (but not the same as) the construct of interest. Through collecting additional data on measures to permit such assessments, the present research was able to assess statistically the degree of expected correlations between the measures and constructs. Overall, the present research considers and assesses the comparative validity of the instrument to help assess the degree of construct validity the instrument possesses.

Criterion validity refers to the extent to which the instrument is related to the external/criterion variable(s) to which they are hypothesised to relate (Hinkin, 1998). It is important that the new instrument is significantly related to the intended criterion/outcome of expatriate assignment success. If no relationship is found, the instrument will be of little value to organisations wishing to improve expatriate

[3] Cronbach and Meehl (2006) referred to this broad theoretical framework as a nomological net.

assignment success rates. Onwuegbuzie, et al. (2009) specifically referred to this form of validity as outcome validity. The present research addressed this form of validity through examining empirically the relationship between the scores on the measure and the expatriate assignment success criteria.

The present research was also interested in the performance of the new personality measure against existing measures of personality. The aim is to produce a measure that is able to improve selection decisions and, in turn, increase expatriate assignment success rates. Incremental validity is a frequently considered variant of both criterion and discriminant (construct) validity (Bryant, et al., 2007), which is concerned with the degree of additional explanatory power the instrument provides over and above another measure of a similar construct (Bryant, et al., 2007). In particular, the present research aimed to develop narrow-bandwidth personality scales that could predict expatriate assignment success better than the broad-bandwidth personality scales. Through statistical analyses, the present research could establish the degree of additional value the new measure has.

3.2.2.2.3 Generalisability. Although sometimes conceptualised as a form of construct validity (e.g. Onwuegbuzie, et al., 2009), the generalisability of a measure refers to the extent to which a measure and its score meanings can be generalised to other populations (Onwuegbuzie, et al., 2009). This is typically achieved through collecting data on large, representative samples (Willig, 2001). According to some researchers, using the same sample to develop the instrument and assess the psychometric properties is inappropriate (e.g. Campbell, 1976) as the factor analytic techniques used to develop the scales may have produced factors that are sample-specific, producing artificially high reliability (Krzystofiak, Cardy, & Newman, 1988). Therefore, Stone (1978) recommends using independent samples to develop the scales and to assess them psychometrically. The present research carried out both approaches, using two separate samples to develop and test the new measure (study 2 and study 3, respectively), each of which included sufficiently sized samples for the analyses required. Therefore, the findings from the present research can be assumed to generalise to the wider British employee population.

3.2.2.3 Study two. The quantitative study in phase two mimics the first three steps in the scale development process (see figure 3.1.). The constructs chosen for the present selection instrument had a theoretical and empirical basis. Therefore, a deductive approach was the most appropriate approach for generating these items (Hinkin, 1998). Each item was carefully considered and kept as short as possible, ensuring that both positive and negative items were included. Each item was checked by an expert to assess the appropriateness and adequacy of the item. Any items deemed inappropriate were removed. A large item pool was developed and the 5-point Likert-type response format suggested by Hinkin (1998) was adopted.

Paper and pencil questionnaires were distributed to British employees within various organisations across the Britain. The paper and pencil method allowed batches of questionnaires to be personally distributed and collected relatively easily. As the instrument was being developed for British employees, it was important to develop the scales based on this population. An alternative option could have been a single round of data collection, which would require the entire sample to comprise of British expatriates and former-expatriate employees. There were two reasons why this was not done. The first was pragmatic, as the large number of initial items required a sufficiently large sample from which to conduct the appropriate analyses. Appreciating the noted difficulty of obtaining data from this group (Takeuchi, 2010), collecting an adequately large sample would have been much more difficult than collecting data from current British employees. Collecting the data in two phases was therefore more pragmatic, and enabled the instrument to be tested on independent samples. Secondly, as highlighted above, using independent samples for developing and testing instruments allows the instrument generalisability to be improved (see Section 3.2.2.2.3).

Following recommendations of Hinkin (1998), poor items identified from low inter-item correlations (i.e. r <.40) were removed prior to EFA. EFAs were then conducted iteratively to refine the scales of the instrument. The number of factors retained depended on the theory underlying the construct (conceptual logic) and the quantitative results of the appropriate analyses (empirical logic). Upon satisfactory extraction of the underlying factors of the scales, the factor loadings of items were then examined. Items that did not meet the minimum criteria suggested by Hinkin (1998) were removed and the analysis was repeated iteratively until a clear factor structure was revealed. The internal consistency of the resulting scale was then examined, and only those scales and items that met the defined criteria were retained. The resulting factors contained a large number of items. To achieve scale economy and brevity, the number of items were further refined using a rating exercise with three disinterested social science researchers. Resultant factors were labelled and defined. Only items that were correctly assigned by two or more independent raters were retained. Internal reliability was re-checked for acceptability before further psychometric assessment of the scales was conducted.

As recommended by Hinkin (1998), the questionnaire also included a previously validated appropriate personality measure (i.e. the Big Five Inventory (BFI), John & Srivastava, 1999) to permit an exploration of the comparative validity of the initial scales. Upon completion of this study, a refined list of items for the instrument was achieved. At this stage, the psychometric properties of content validity (face and item), reliability (internal consistency), and comparative validity (convergent and discriminant validity) were examined. Overall, a new expatriate personality measure had been developed at the end of this phase and further psychometric assessment was necessary in another study.

3.2.3 Phase three. The final phase of the thesis had two main aims and brought together the research questions from study 1 and study 2. Firstly, the study assessed quantitatively the degree to which the factors derived from study 1 were related to expatriate assignment outcomes in British expatriate populations. Secondly, the study also aimed to confirm the structure of the instrument (structural validity), perform further psychometric assessment of the validity of new personality measure, and explore whether the narrow-bandwidth personality measure can better predict expatriate assignment success outcomes than broader-bandwidth personality measures (i.e. steps 4 and 5 of Hinkin's (1998) process, see figure 3.1.). The study also sought to examine the relationships between new variables that have not previously been examined before in the expatriate empirical research literature. Therefore, the study aimed to gather additional information around the chosen factors from study 1 and highlight potential areas for future research. To achieve this, the final study used an embedded mixed methods design (Creswell & Plano Clarke, 2007), that was quantitatively dominant

(Caracelli & Greene, 1997), and used what Greene, Caracelli, and Graham (1989) referred to as complimentary and expansion mixed methods study rationales.

The questionnaire method was employed to collect data on the chosen factors derived from phase one and the new personality measure. A web-based format was chosen because it provided a quick and cheap method of data collection that is ideal for collecting data from difficult or challenging groups to access (Wright, 2005), such as the present target group. The online format provided a pragmatic approach to data collection that results in similar or better response rates than traditional paper-and-pencil formats (Mehta & Sivadas, 1995; Stanton, 1998; Thompson, Surface, Martin, & Sanders, 2003). Existing measures were included in the questionnaire to assess the factors derived from the qualitative study in phase one, the new personality scales, and outcomes of expatriate assignment success. The new expatriate assignment outcome variable was also included in the final study, which represents the first study to include this outcome measure within this level of expatriation research.

The target samples for phase two were: (1) British employees who have been and returned from an expatriate assignment; and (2) British employees currently on an expatriate assignment. This first population was necessary to provide data for assessing the instrument's criterion validity of completion of assignment, and the second population was necessary to overcome the access barrier from organisations (see Section 4.2.). Due to the fact that accompanying spouse and partner personality were highlighted as important in study 1, a second online questionnaire was sent to accompanying partners or spouses of expatriate employee participants to collect this data from this additional population.

Analyses and results derived from these chosen variables and new measure were carried out in order answer the research questions posed, and extend existing knowledge of relationships between predictor and outcome variables. Quantitative statistical analyses were also carried out to assess the psychometric rigour of the new personality measure. This included an assessment of criterion validity (i.e. the relationships between the personality measure and the expatriate assignment success criterion), comparative validity (i.e. the degree of similarity and dissimilarity between corresponding constructs of interest), and incremental validity (i.e. the amount of additional value the new measure had over the existing measure of personality).

Within this phase, qualitative questions were embedded within the questionnaire to support the quantitative data (Creswell & Plano Clarke, 2007). Qualitative (open-ended) questions were included that focused on the factors highlighted during the qualitative study of phase one. The aim was to gather additional information on these factors that could compliment and support the previous results, as well as afford the opportunity for any other important or specific ideas to be collected. In an attempt to make the most from the data gathering process, collecting this additional data provided the potential for the results to be elaborated upon, which could in turn provide useful and important information to guide future research in the area.

3.3 Qualitative Research Issues

Despite debates by some qualitative researchers regarding the acceptance of the term reliability, validity, and generalisability within qualitative methodology research (e.g. Denzin & Lincoln, 2005), tackling these issues is a concern of any researcher, regardless of theoretical or methodological perspective (Silverman, 2001). According to Silverman

(2001), the primary concern of qualitative researchers is to produce research that is credible, and addressing the issues of reliability, validity and generalisability are important to establish this credibility. The manner with which each issue is dealt with is different depending on the research method. Earlier in the chapter, reliability, validity and generalisability were discussed in relation to quantitative research. This section addresses these terms again but in relation to qualitative research and illustrates how they were considered in the present research.

3.3.1 Reliability. Reliability is concerned with the degree of consistency and the manner with which the research is conducted (Kvale, 1995). In quantitative research, using standardised procedures as the present research does, is a way of attaining some reliability (Mitchell & Jolley, 2001). According to some qualitative researchers (e.g. Silverman, 2001), applying appropriate and rigorous qualitative methods should in itself should produce reliable results. The present research chose qualitative methods that best answered the proposed research questions, as well as in keeping with the overall pragmatic philosophy of the research. Published guidelines were rigorously followed and documented in the appropriate chapters of the thesis, allowing readers to understand the decisions and steps taken to perform each element of the qualitative research. These steps included additional features that were incorporated to increase the reliability, and in turn credibility of the results.

Data collection in qualitative research should produce a comprehensive record of participants' responses (Willig, 2001). Within the present research, two qualitative data collection points were conducted. In phase three, participants gave written responses to the questions within the questionnaire. Due to this format, data was already fully accountable and available. During the qualitative data study in phase one, the focus group method was employed. In designing and conducting this study, appropriate measures were required to ensure comprehensive records of participants' responses were obtained. The decision was taken to make digital recordings of each focus group in order to retain a high quality replication of the groups' conversations. Making recordings such at these provides good access to participants' words, thereby retaining direct access to raw data (Silverman, 2001). Transcripts could be produced verbatim and deliver what Searle (1999) referred to as low-inference descriptors. Low-inference descriptors are associated with high reliability in qualitative research (Silverman, 2001). They reduce the amount of subjectivity or personal perspectives of the researcher to influence the reporting of responses. Through high quality recordings and verbatim transcripts, the data collected accurately reflected the data provided by respondents, thus reducing biasing influences and enhancing the reliability and credibility of the research.

During the data analysis and interpretation stages, thematic analysis was chosen to derive the important themes for successful expatriate assignment. Continuing with low inference descriptors, the data were extracted and analysed at the "explicit" or "surface" level meaning (Braun & Clarke, 2006, p. 84). By extracting data at this level, the researcher did not have to go beyond the raw data and theorise about underlying meaning (Braun & Clarke, 2006). This reduced the degree of inference necessary by the researcher and served to produce low-inference descriptors and higher reliability of the results. Reliability was further enhanced during this phase by having the themes checked by an external, independent researcher (i.e. inter-rater reliability) (Creswell & Plano Clarke, 2007; Silverman, 2001). Inter-rater reliability ensures that the analysis derived themes in a standardised way (Silverman, 2001). Themes were checked by an independent researcher to ensure the results accurately and reliably represented the data. Agreement between the researcher and the independent rater verified the findings and supported the notion of having derived credible results. As in quantitative research, ensuring reliability plays an important role in obtaining valid qualitative results (Silverman, 2001).

3.3.2 Validity. Validity is concerned with the extent to which the research describes, measures, or explains what it intends to (Willig, 2001). As highlighted above, there are several forms of validity that the present research strives to achieve through various elements of the research design (see Section 3.2.2.2.). Of primary concern in establishing validity within the qualitative methodological approach is the quality of the interpretation (Taylor, 2001). The present research addressed this through exercising researcher reflexivity and employing respondent validation. Researcher reflexivity involves accepting the influence of the researcher on the research process and exercising an appropriate level of quality control and documentation to reduce the amount of personal impositions or inferences being made by the researcher (Willig, 2001). This quality control approach demonstrates Kvale's (1995) notion of "craftsmanship" that is said to dictate the validation of qualitative research. Quality is assured through continual checking and questioning of the decisions or procedures used in the research to ensure they are appropriate and accurate. The present research demonstrated this craftsmanship through explicit documentation of the researcher inputs within the appropriate stages of the research. This explication of the steps and decisions made through the research process helped promote more accurate interpretations, which in turn helped promote validity (Willig, 2001).

To aid appropriate and accurate interpretations, the present research also utilised respondent validation[4] (Creswell & Plano Clarke, 2007). The method of focus groups permitted the researcher to summarise interpretations of participants' responses and group discussions and present these summaries to the groups by directly asking participants to accept or correct what had been understood by the researcher. This prevented misinterpretation of participants' responses and minimised personal impositions of the researcher. Therefore, it was possible to be confident that the responses were interpreted correctly (Willig, 2001). Extracts of transcripts are also presented in the appropriate results sections of the thesis. By doing this, extracts help illustrate what has been said and also help provide a representative portrayal of responses from the target population. Ensuring this representativeness is important because it demonstrates that the results of the qualitative research are generalisable.

3.3.3 Generalisability. As the present research was designed to identify factors underlying expatriate assignment success in British expatriate employees, and develop and test an instrument that can be used on all British employees, it was necessary to be able to generalise the results of the qualitative studies (Willig, 2001). Within quantitative research, the issue of generalisability is a standard aim and is usually achieved through appropriate sampling procedures (i.e. large and random) (Silverman, 2001). However, for qualitative research, smaller, non-random samples are typically used due to the time- and labour-intensive nature of this inquiry (Willig, 2001). This does not mean that results are not generalisable. According to Haug (1987), "if a given experience is possible, it is also subject to universalism" (p. 44). Accepting the possibility of generalisability, despite

[4] In the second instance of qualitative data collection, it was not possible to contact respondents in order to corroborate the results due to anonymity of data collection (see Chapter Seven).

using small samples, the present research strove to enhance the generalisability of the results through applying four advocated methods for qualitative research. These included purposive sampling, collecting data until a theoretical saturation point was achieved, using accumulative techniques, and the comparative method, which are described below.

Using purposive sampling increases the generalisability of qualitative research findings (Silverman, 2001). With purpose sampling, "particular settings, persons, or events are deliberately selected for the important information they can provide that cannot be gotten as well from other choices" (Maxwell, 1997, p. 87). For the present research, the appropriate group was former-expatriated British employees who could provide specific, first-hand information about the important factors that they felt influenced their decision to stay or leave the assignment and perform well. Representativeness was achieved through inclusion of cases from various sectors, industries, and genders that reflect the populations of employees who are sent on expatriate assignments from the UK. By doing this, the results provided an adequate degree of representativeness, and provided results that are generalisable to the wider population of former-expatriate employees from Britain (Teddlie & Yu, 2007).

Also within the qualitative study of phase one, focus groups were continued until a theoretical saturation point was reached. When no additional information or themes are revealed through continued data collection, the decision should be made to cease further data collection. Not only does this reflect a pragmatic approach to data collection, but it also reflects a reasonable assumption that the results obtained up to that point accurately reflect what would be found if data collection continued. Working to a saturation point during this study helped provide results that could confidently be taken to reflect the majority of former-expatriated British employees.

Another method that was employed in the present research was accumulative techniques (Willig, 2001). The qualitative results derived from phase one were subsequently investigated through acquiring quantitative data in phase three. Comparing the results of larger samples with the findings from the qualitative (smaller sample) study can provide support for the notion of representativeness (Hammersley, 1992). Through quantitatively measuring the qualitative factors derived from phase one, accumulative empirical evidence can be obtained to determine the significance of these factors upon expatriate assignment success against a larger population of British former- and currently expatriated employees.

The third method used for promoting generalisability was the comparative method. Hammersley (1992) suggested obtaining information about relevant aspects of the population of interest, for example from available literature, and comparing this information to the results of the qualitative research. By comparing the information with the results of the study, supporting or similar findings would help establish direct generalisability of results (Peräkylä, 1997). Through discussing the present results in relation to the research literature, the qualitative findings were supported, giving a "firmer basis" for the generalisability of these findings (Silverman, 2001, p. 250). These comparisons are presented at various stages in the thesis.

3.4 Chapter Summary

This chapter has outlined the mixed methodological research approach used within a pragmatic-realist theoretical approach. The chapter discussed each of the three research phases, which follow on sequentially from one another. The issues of reliability, validity and generalisability were also addressed describing how the research accomplished them. The chapter has outlined the rationales for each phase of the research, each of which had different aims. Overall, the thesis attempted to contribute to knowledge and theory in the field of British expatriation, examine new relationships within the expatriate population, and develop a practical measure for application in future research and practice.

4. Phase One - Study One

4.1 Introduction

The present qualitative study was conducted due to a lack of empirical evidence on factors that contribute to expatriate assignment success specifically for British employees. An in-depth exploration of expatriate assignments from the perspective of British employees was possible by adopting a qualitative method. Data originating from selected participants allowed the researcher to gain sufficient understanding of the situation through first-hand experiences discussed in the groups (Dhar, et al., 2008). In accordance with the aim of the present study, the research question posed was:

What are the important factors to consider for a successful expatriate assignment from the perspective of the British expatriate employee?

4.2 Method

4.2.1 Method choice: Focus groups. The focus group method was chosen to answer the research question. Focus groups involve informal, relatively unstructured group discussions based on a number of questions posed by a moderator (Wilkinson, 2008). Unlike one-to-one interviews, the moderator does not ask each participant the questions serially, but facilitates and encourages interaction between group members. As a result, various perspectives can be revealed in ways that are different from individual interviews (Bryman, 2001). For example, discussions between group members can prompt memories that would otherwise have been forgotten by individuals without the influences of other individuals, as well as bringing about debates between members, encouraging further elaboration or clarification on points made by participants, resulting in more realistic accounts and views from participants (Bryman, 2001). These elements make focus groups an effective method to use when attempting to access individuals' understanding, opinions or views (Wilkinson, 2008). The unstructured nature also permits the topics of discussion to stem from the participants, meaning that what is most significant or important to participants is discussed (Bryman, 2001). Focus groups have been used previously and found to be insightful in expatriation research (e.g. Hammer & Rogan, 2002). They also allow a large volume of data to be collected relatively quickly and cheaply (Wilkinson, 2008) making focus groups a pragmatic research method that is in-keeping with the overall philosophical position of the research.

4.2.2 Sample. Purposive sampling strategies were employed to locate British adult employees who had experience of being sent on and returning from an expatriate assignment (i.e. repatriates). Some qualitative expatriation research has included some participants from the UK (e.g. Jassawalla, Truglia, & Garvey, 2004; Littrell & Valentin, 2005; Mathur-Helm, 2002), but numbers have been very small and focused on single genders. While expatriate assignment positions are filled by men (Scullion, 1994), the number of female expatriates is increasing (Brewster & Hegewisch, 1994), which has led to calls for more qualitative research involving female expatriates (Mayrhofer & Scullion, 2002). Therefore, it was important that both genders were included in the present sample. In total, fourteen participants took part in the study, twelve of whom were males (86%) and two were females (14%). Three other females had agreed to take part but dropped out. Participants came from public (one) and private sector organisations (four) covering a variety of industries, including retail, education, automotive, manufacturing, and pharmaceutical and healthcare. The destinations of these former-expatriates included the US, Germany, India, Malaysia, and China. The relationship status and family set-up of these individuals at the time of the assignment also varied, including employees whose family/partner accompanied them overseas, an employee who was in a relationship but relocated alone, and employees who were single either during or at the time of their departure. The breadth of experiences offered by this sample allowed a diverse set of experiences to be collected.

4.2.3. Procedure. The present study was granted ethical approval by the Ethics Committee at the Institute of Work, Health and Organisations in 2006. Multinational organisations within the UK were contacted using cold-calling and emailing. Organisations that were happy to participate in the research then identified employees with the relevant experience to contact and invite to focus groups. Emails were sent to identified employees informing them of the study and invited to take part in a focus group that would last approximately one hour. If employees wished to take part, they were asked to contact the researcher directly, to maintain the anonymity of employees to their organisations. Focus groups were held either at the University of Nottingham or within the premises of the participating organisation, ensuring that the locations were private and quiet.

An interview schedule was devised for the focus groups, and sessions were moderated by the researcher to ensure consistency. At the beginning of each focus group, the purpose of the session was reiterated to participants. Each participant was informed of their right to withdraw and assured of confidentiality. Participants were asked for their verbal consent to participate before commencing data collection. Participants were then asked for their permission for an audio recording to be made of the focus group discussion for later transcription. All participants were happy for the recording to be made.

Ground rules were proposed at the start of the focus group session, including the importance of demonstrating respect for other members and not disclosing any information from the discussions outside of the focus group. Ice-breaking questions were also used at the start of the focus group to relax participants and create a friendly, open environment. Once the moderator was satisfied this had been achieved, the main research question was posed to the group. Probe questions were used where appropriate and the researcher applied a minimal level of moderation only where necessary. It was important that the discussion was kept within one topic of interest, and that each individual had the opportunity to share their input. Due to the relatively unstructured nature of the focus group, certain group effects could not be mitigated (e.g. dominant and difficult individuals influencing discussions) resulting in inequitable member contributions and data that were potentially biased and unrepresentative. Therefore, some moderation was necessary. Krueger (1994) recommends explicitly stating the importance of other member's views and making a concerted effort to engage each member. Where necessary, this was carried out and the moderator attempted to encourage equal contributions from each participant.

Throughout the focus group discussions, the moderator made notes on the responses in order to provide a summary to the group at the end. This permitted clarification and any corrections of interpretations to ensure the researcher understood the points raised by the group (i.e. respondent validation, Silverman, 2001; see Section 3.3.2). After clarifications, participants were thanked for their participation and debriefed. Any questions raised by participants were answered at this stage, and participants were informed that if they had any further questions or issues after the session they could contact the moderator directly.

Using the recommendation of Calder (1977), focus groups were conducted until the researcher could anticipate fairly accurately what the next focus group said. This is referred to as a saturation point. When this is reached, no additional information is being obtained and continuing to conduct more focus groups was not necessary (Bryman, 2001). Four focus groups were found sufficient to answer the proposed research questions as no new significant information was revealed during the fourth focus group. These focus groups were conducted between 7th December 2006 and 20th April 2007. The audio recordings were transcribed verbatim, which resulted in 3,651 sections of text for analysis.

4.3 Data Analysis

The aim of the analysis was to break down the collected data into meaningful and manageable segments of information that could be interpreted and used to answer the posed research question. Thematic analysis (TA) was chosen because of its suitability as "a method for identifying, analysing and reporting patterns (themes) within data" (Braun & Clarke, 2006, p. 79), whereby a theme "captures something important about the data in relation to the research question" (Braun & Clarke, 2006, p. 82). It is an analytic approach typically used in qualitative research (Smith, 2008), especially for focus group data (Wilkinson, 2008). It has been described as a flexible analytical technique that does not require a strong adherence to a specific set of rules or an in-depth theoretical or technological knowledge of the approach, making it an ideally accessible method for less experienced qualitative researchers (Braun & Clarke, 2006).

The guidelines presented by Braun and Clarke (2006) were chosen to conduct the TA. According to these authors, the high degree of flexibility offered by TA requires a number of decisions to be made explicit. The decisions include the way in which the themes are derived or identified, and the "level" at which the themes are identified. These decisions are largely influenced by the philosophical framework of the thesis and aims of the study.

4.3.1 Theme identification. Themes were identified using an inductive ("bottom up") approach, without the use of my pre-existing coding framework. This was considered the most appropriate approach as it allowed the themes to be driven by the data (Patton, 1990), thereby capturing what participants thought were the important factors, not what the researcher thought was important.

Two levels exist for identifying the themes, but TA typically focuses on only one level (Braun & Clarke, 2006). The present analysis focused on the explicit (semantic) level, whereby only the surface meaning of the data was examined. The alternative would be to examine the underlying meanings of the data, which is referred to as analysis of the implicit or interpretive level of identification (Braun & Clarke, 2006). As the aim of the study was to collect the views of participants as to the most important factors for a successful expatriate assignment, implicit level analysis was not necessary. The explicit level of theme identification is also more in keeping with the pragmatic approach of the research.

4.3.2 Ontological position. As described in Chapter Three, the realist ontological position is typically adopted in most psychological research (Wilkinson, 2008), as a unidirectional relationship between meaning, experience and language is assumed (Potter & Wetherell, 1987; Widdicombe & Wooffitt, 1995). Under this position, it is possible to theorise about individuals' personal ideas, opinions and understandings in a relatively straightforward way (Braun & Clarke, 2006). According to Braun and Clarke (2006), the exploratory nature of the present research question of the present research positions it within this ontological perspective, and the analysis used to interpret the data is congruent with this approach.

4.3.3 Thematic analysis procedure. Braun and Clarke's (2006) TA guidelines include a multi-stage analytical procedure. The first stage involves becoming familiar with the data or text. This was achieved by reading and re-reading the text, and making notes on initial ideas for codes. Stage two involved creating initial codes for the data, whereby a code refers to "the most basic segment, or element, of raw data or information that can be assessed in a meaningful way regarding the phenomenon" (Boyatzis, 1998, p. 63). Identification of interesting features from the data was carried out in a systematic manner across the whole data set, pooling together relevant data for each code. These codes were typically narrower than the final themes. Parallel coding was employed, which permitted the same section of text to be classified into two or more codes. This maximised the amount of information that could be derived from the data.

The third stage of analysis involved searching for themes in the data. This included combing codes together into potential themes and collecting relevant data together for each potential theme. According to Braun and Clarke (2006), themes capture important information in relation to the research questions and represent a level of patterned or prevalent response from the data set. Braun and Clarke (2006) state that there is no right method for determining prevalence, and flexibility should be endorsed as rigid rules do not work. The authors suggest that instead, a consistent method of identifying the themes should be maintained. In the present study, prevalence was conceptualised in terms of the number of participants and numbers of focus groups that spoke about a topic (i.e. the more participants and focus groups that spoke on a topic the higher the prevalence).

A hierarchical thematic structure was developed, including both themes and sub-themes to represent the data. These themes were then reviewed in a fourth stage to establish if they worked in relation to the extracts that were coded and to the whole data set. The fifth stage required themes and sub-themes to be named and defined. Then the reliability of the themes was then checked. Focus group transcripts were given to another occupational psychology researcher, experienced in qualitative research, together with the thematic structure, in order to check whether the themes reflected the data. Miles and Huberman (1994) acknowledged that different interpretations of the data are possible and both are often viable. According to these authors, discussing disagreements can be beneficial. Discussions were therefore held with the external researcher regarding their interpretations. Overall, the external researcher felt the original themes were an accurate reflection of the data (see Appendix 1 for coding system).

4.4 Results

During the focus groups, discussions continually overlapped between factors. Performing parallel coding permitted coverage of the various factors. Quotations are used to illustrate examples of the themes, using the following formula: $F_x.X_1.X_2$, where F_x = focus group number (1-4); X_1 = participant number (1-5; X used when the participant could not be identified from the recording); X_2 = section of text from the transcript (X used to reflect quotes recorded in the researcher's notes when participants spoke after the recording stopped).

4.4.1 Question responses: Important factors to consider. Nine themes were derived from the data. Themes reflected factors relevant to pre-assignment, during assignment, and post-assignment stages, and are discussed below according to their prevalence (see Appendix 1).

4.4.1.1 THEME 1: INDIVIDUAL. The most prevalent themes derived from the data centred on the employee who was being sent on the expatriate assignment. The theme comprised two sub-themes: the employee's personality characteristics; and the individual's interest or desire to go abroad.

4.4.1.1.1 Sub-Theme 1: Personality characteristics. Within each focus group, the personality of the employee to be sent on the expatriate assignment was unanimously highlighted as the fundamental factor for determining if an assignment was to be successful or not. Discussions highlighted the importance of being of a particular disposition to be successful. Participants generally believed that not everyone would be suitable, or could be successful in an expatriate assignment.

"I think you do definitely have to be of a certain sort of personality to be able to do it" ($F_1.1_1.259$-60_2)

"one of the questions you have to start with is what sort of character the person should be" ($F_4.X_1.131$-2_2)

Dialogue included various personality characteristics or attributes that participants felt were important for an expatriate to possess. These characteristics tended to include words and phrases such as *"open-minded", "out-going", "easy-going", "flexible"* and *"confident".* Such descriptions portrayed the ideal profile for an expatriate employee. Namely, that they could cope with the change of environment and were willing to try novel things. For example, the following passage refers to behaviours faced in day-to-day situations, both at work and in non-work situations, where such a disposition was important.

"And I guess when it's like UK you just kind of think, yes, fine, but when it's that kind of behaviour in a completely different environment and country where at the end of the day you're trying to fit into their world, you've got to be a bit more bendable, a bit more... you've got to be able to change a little bit, not only to different people but different environments, I think maybe again that's where our open-mindedness helped us, that, you know, you can see people's different behaviours and you try and work with them because at the end of the day you've got to get something out of there, and you're best to work with them than try to force them to do what they don't want to do, because they won't do it." ($F_3.1_1.302$-11_2)

This passage demonstrates the importance of appreciating and acknowledging cultural differences. Being flexible and open to these differences and working together with HCNs instead of against them were regarded as important. Therefore, an individual who prefers doing things their own way, and who do not like change or trying new things might struggle with the requirements such an assignment where these obstacles are unavoidable.

4.4.1.1.2 Sub-Theme 2: Interest and desire to go abroad. According to the focus groups, another important predictor of expatriate assignment success relating to the individual was the employee's level of interest and desire to going abroad. Every focus group thought that being interested in the new country or culture was an important aspect of the individual. If the individual did not have this interest then sending this employee on an expatriate assignment could be problematic for both the organisation, and for the individual and their family. Participants therefore felt that having this desire or interest in going abroad was extremely helpful, if not essential, for an assignment to be successful.

"you've gone out because you've wanted to live and work abroad"

($F_3.1_1.675\text{-}6_2$)

"there's also that interest, you've got to be interested." ($F_1.2_1.325_2$)

4.4.1.2 THEME 2: SPOUSE/ PARTNER & FAMILY. The second most prevalent theme derived from the focus groups was issues surrounding the spouse/ partner of the employee and their family. Participants highlighted that the family is also affected by the assignment and this would have repercussions on the employee and the assignment.

"they'd obviously have to go through it... family and kids and things like that."

($F_1.X_1.594\text{-}5_2$)

Within this theme, three sub-themes were identified. These included the accompanying partner/spouse, children, and the situation where the spouse/partner and family remained in the UK.

4.4.1.2.1 Sub-Theme 1: Spouse/ partner personality. Within discussions about the role of the family, particular attention was given to the spouse or partner of the employee. Participants felt that being in a new culture and country is equally challenging for the accompanying spouse/ partner as it is for the employee. For that reason, having the right mindset or personality in order to cope with the challenges of the new country, finding ways to overcome the challenges and be happy in the new environment were seen as a crucial factor for an organisation to consider.

> *"I think the partner has to have a particular mindset as well because it really is quite a wrench."* ($F_1.2_1.242\text{-}3_2$)

> *"they've also got the character to be able to go and find things that are going to keep them mentally stimulated and happy."* ($F_4.X_1.405\text{-}7_2$)

Personality of the partner or spouse was also deemed important even if they do not accompany the employee abroad and stay in the UK. Participants in the present sample comprised both employees whose spouse/partner accompanied them, and also employees who left their spouses/partners behind. Of those who left their partners behind in the UK, discussions included struggles that were faced when trying to cope with living apart, and the importance that personality can play in this situation. The excerpt below provides a description of the potential significant negative outcomes that can result from this difficult living situation.

"As I say you've got to be a certain mindset yourself but then your partner has also got to be understanding and sort of share a part of that mindset because you are going to be apart for quite some time...... I went back a couple of times throughout the year and ... [I was] *very fortunate that there was no lasting damage. But I know that other people have worked abroad, my friend worked in Johannesburg for a long time, and his marriage broke down because they just didn't have that communication when he returned. He'd been away too long."* ($F_1.2_1.448\text{-}50,459\text{-}63_2$)

This particular situation is discussed in more detail later, but the above quote demonstrates the potential crossover effects the expatriate assignment situation can have, and the importance of having the suitable spouse/partner – either for accompanying the employee or staying in the UK.

4.4.1.2.2 Sub-Theme 2: Children. Accompanying children were also raised as an important factor for organisations to consider when sending an employee and their family abroad. Discussions highlighted the potential strains faced by employees when they have children, as parents have to accommodate and deal with the additional relocation problems experienced by their children. Participants felt that organisations should be aware of the significance of this issue and assist in accommodating the children and their needs.

Education was regarded as a primary concern to the expatriate. Some participants spoke of their positive education experiences and provisions for their children. For example, some felt that the quality of the education was better than in the UK.

"It so happened that there were British schools in KL that were better than you find in Nottingham, so that wasn't a problem but other places it's probably different." ($F_2.3_1.568\text{-}9_2$)

While the quality of education could be better abroad, some participants still felt anxiety regarding the effects that being educated abroad may have on their children. Below is an example of a concern one parent had regarding their children fitting back into school upon return to the UK.

> *"You bring your kids back and they say ... they go to a school and they're asked oh where did you go to secondary school, they say South East Asia and people say oh ... that's the last time anyone talks to you because they find it completely strange."* ($F_2.4_1.860$-3_2)

Participants highlighted the importance of organisational provisions for expatriate's children in order to help employees maximise the possibility of succeeding. Some participants believed that their organisation did not provide enough for employees' children. Consequences of this also included other negative situations for the organisation, including failure to recruit quality employees for these assignments.

4.4.1.2.3 Sub-Theme 3: Spouse/ partner & family remain in UK. Some participants of the focus groups had direct experience of spouses/ partners and families remaining in the UK whilst the employee is posted abroad. Overall, the general consensus was that a non-accompanying spouse/partner or family can be, or was, quite a difficult and problematic situation for the employee.

> *"I would say that anyone working abroad who's not with their partner, especially if they have any children, it's going to be a big problem."* ($F_1.2_1.239$-40_2)

Typically, the employee will travel home regularly in order to visit the family. By doing this, the employee may experience a number of problems. For example, employees can sometimes fail to integrate properly into the new culture from spending insufficient time in the host country, so as to immerse them fully into the culture and create a new life within it. Commuting to and from countries in order to visit the family can also exhaust the employee, having direct effects on job performance.

Participant: *"Well it's the other scenario isn't it, that if the family doesn't move out and the person working for the company just sort of goes out on a Monday and goes back on a Friday and that's also ..."*

Participant: *"I don't think you integrate as much doing it that way."*

Participant: *"I must admit I think I did that for the first month, not as long as you had done, I did it for a month and thought I couldn't do that any more".*

Participant: *"It's exhausting."*

Participant: *"That's it. You can't really apply yourself I don't think, but people have personal circumstances that, you know, maybe kids are in school or whatever."*

Participant: *"That makes the working week shorter as well, when you return like Monday morning or Monday lunchtime and you leave on Friday and you still have to prove that you are capable to do the assignment on the same level as people doing the job back home."*

($F_4.X_1.411\text{-}23_2$)

Participants felt that organisations should be aware of this living arrangement and provide assistance whenever possible. It is important to note here that although families living apart were regarded as difficult, it was not seen as an impossible situation. It was merely suggested as bringing about other challenges with which the employee (and organisation) is required to deal with.

4.4.1.3 THEME 3: LANGUAGE ISSUES. The third most prominent theme from the focus groups was the issue of language. For most of the participants, assignment destinations were to non-English speaking countries. Discussions primarily centred around the issue of being able to speak the language and whether this was necessary to perform well during the assignment.

Some participants believed that speaking the language of the host country was important and if they could not converse in it prior to arrival, learning the language on the job was a necessity. Participants felt that not being able to speak the language initially placed greater difficulties and strains on them, which some participants felt impacted on their ability to perform in their job.

> Participant: *"I think most of us as well were put into departments where we had to speak German from Day 1.... we were all expected I think to speak German as the business language."*
>
> Moderator: *"If you didn't speak German before you went did it cause any problems?"*
>
> Participant: *"Yes."*
>
> Participant: *"Yes, definitely."*
>
> Participant: *"The first nine months were very difficult."*
>
> Participant: *"Tiring."*
>
> Participant: *"Tiring, and also kind of de-motivating because you're constantly aware that you're not really able to do your job properly."*
>
> (F4.X_1.96-107_2)

As the above quote describes, being able to speak the host language prior to arrival was considered by participants to be an advantage. But of those participants who were required to learn the host country language in order to carry out their job, none failed their assignments. The difficulties experienced from not speaking the language were particularly apparent during the early phases of the assignment. Participants who could not speak the host language prior to arrival were required to learn by doing. In these situations, emphasis was placed on the individual's outlook and approach to learning the language. Expatriates needed to accept that learning the language would involve a lot of time and a lot of mistakes. This acceptance of the learning process was highlighted as instrumental to the employee's ability to learn the language. This was linked back to the importance of having a suitable personality to be able to succeed.

> *"a guy who couldn't get over the language thing... and he would only say something if it is accurate. You simply can't do that. Even after three years you can't always be accurate, so in the first six or ten months it's just not possible, so he just didn't say anything and clearly if you don't say anything you can't do your job"* ($F_4.X_1.$444-5,447-50_2)

The above quote describes an individual's withdrawal behaviour and their fear of making mistakes. As a consequence, the individual had problems learning the language fully. In the end, this negatively impacted on job performance. The approach to learning the language was related to the personality of the individual and their confidence to deal with new and uncomfortable situations. This supported the importance of personality and its knock-on effects on other important areas of expatriate assignment.

For other participants, little or no demand was placed on them to speak the host country language. For these employees, language issues were not considered a problem as the host country either spoke English or because English was the business language spoken there. This allowed the employees to perform their jobs without language difficulties.

"the business language in India was English anyway so it wasn't an issue at all really. The guys there speak English to themselves a lot of the time because they've come from all over the place so English is a common language" ($F_1.1_1.433\text{-}6_2$)

In situations where English was not the host country language and the job did not require the employee to speak to host country language, participants still considered speaking the host country language as an advantage. Whether in a work and social context, speaking the native language was highlighted as beneficial.

Moderator: *"So was it essential that you had to learn the language when you were there?*

Participant 2: *"Absolutely not. English is the second language there for a lot of what we call trading houses in Japan and that's where I was doing a lot of my business, in trading houses and I would say that it was more a fact that it was part of the culture and I wanted to fit in and I wanted to be not the alien and not the outsider and so I just tried to absorb as much as I could so that I just ... so they felt comfortable with me but more than that, I felt comfortable being around them."*

($F_1.2_1.134\text{-}41_2$)

Overall, participants had mixed experiences and opinions about speaking the host country language and successful assignments. When it was required for the job, participants expressed experiencing anxiety and difficulty when they could not speak the language prior to arrival. Yet none of these employees failed their assignment, as they learnt the language on the job. Participants believed their personality and confidence played a significant role in the success of their assignment.

4.4.1.4 THEME 4: ORGANISATIONAL SUPPORT. Within this theme, participants discussed the importance of having, or perceiving to have, support from the organisation for both themselves and their family. Participants stressed the importance of feeling secure and confident that if anything happened, either to themselves or to their family when abroad, the organisation would be there to support and help them.

Participant 1: *"I think it's having the confidence in the company that if anything does go wrong that they're going to support you."*

Participant 2: *"Yes."*

Participant 1: *"In fact I think that's a major factor."*

(F_1.1,2_1.486-9_2)

Participants highlighted that support can come from the parent company and the host company. Organisational support from the parent company was considered particularly important.

"I think it depends on the firm as well in the UK....the support you get back from head office or whoever's sent you out there." (F_1.1_1.539-40_2)

Both positive and negative experiences of parent company support were expressed by participants. One focus group, comprising of employees from one organisation, spoke of some particularly negative experiences regarding organisational support. Discussions on this issue dominated the conversation in comparison to the other focus groups. Within this focus group, participants felt they received little organisational support, if any. Their impression was that the parent organisation would try and do anything to get out of supporting the employees and gave the impression of being callous toward employees and their families. Participants in this group felt unanimously that this was unacceptable and more should have been done by the organisation.

> *"we were expecting challenges, we were there to do the best job we could, and we've all said that, we were there because we were committed to it, because we wanted it to work, and as a result we expected the HR to just be on our side and to say what do you need, how can we respond to that, how can we support that, what needs do you have in that, and instead there was a certain amount of how can we avoid giving you any extra"* ($F_2.4_1.221\text{-}6_2$)

Other focus groups described some positive experiences of support by their organisation, yet whether participants had positive or negative experiences, perceiving support from the organisation was regarded as an important factor for a successful expatriate assignment.

4.4.1.5 THEME 5: PRIOR KNOWLEDGE. Prior knowledge referred to information about the assignment that the employee had prior to departure. This knowledge contained two sub-themes: expectations; and training.

4.4.1.5.1 Sub-Theme 1: Expectations. Participants felt that employee expectations were an important factor for an organisation to consider when deploying for expatriate assignments. These expectations include issues such as what the employee expected from the job role, and how long they expected the assignment to last. The focus groups revealed considerable variations in the experiences and opinions on this topic. For example, some participants had clear and precise expectations of the assignment, whilst others had inaccurate or no expectations. Participants felt that organisations should consider the employees' expectations on these issues and manage them accordingly.

"We were doing all kinds of things that we wouldn't do back here and I think this is where my gross naivety came in. I was basically expecting a little bit of [the participant's organisation] to somehow be transported from here to there for it all to be the same and it wasn't the case and, looking back, there's no reason why it should have been the case and I should have been expecting challenges and up for challenges, which I was to an extent."

($F_2.1_1.215\text{-}20_2$)

The above quote illustrates the expatriate expecting similarities between the home and host country role, but instead faced with differences and challenges. Therefore, having expectations managed was regarded as an important feature of the assignment as it prepared the employee for these challenges and difficulties, which in turn, would help overcome them.

One focus group highlighted the importance of knowing why employees were being sent abroad. Understanding these reasons was seen as an important part of the preparation by some participants.

"I think one of the things, coming back to, you know, what is important ... it's understanding why you're going there, I think that has got be part of the preparation" ($F_4.X_1.569\text{-}71_2$)

Knowing what to expect when returning home was also considered as something that employees would have liked to have had more knowledge about. Others did not did not agree, suggesting that it was impossible to plan ahead for that amount of time and provide accurate expectations of where and what an employee will be doing, or want to do, in their role.

"you clearly don't know .. I mean you know that there should be something when you come back, you don't know .. it's not like you've got a career path plotted and in three years time ... work's not that clear cut....... you change, and the job you might want to do now, you think you might want to do in three years, when it comes to the time you probably don't want to do." ($F_4.X_{1.}$649-52,664-6_2)

Knowledge of assignment duration was raised in some focus groups as important for employees' preparation and managing their expectations. Some participants knew how long they were going away for whilst others had approximate expectations.

"I was told it would probably be three years maximum sort of thing, but I knew it wasn't going to be less than a year..... So I knew it was going to be between two and three years sort of thing depending how quickly I managed to get a team in place." ($F_1.1_{1.}$54-5,57-8_2)

A number of participants were sent abroad to perform or fulfil a particular task and a specific duration was not attached to it. Participants felt that although sometimes difficult for an organisation to specify duration, if possible, it would be useful for employees (and their families) to know prior to departure how long they are going to be away.

On the whole, participants felt that having their expectations managed prior to arrival would have a positive impact on the outcome of the assignment, and organisations should try and take into account this issue when sending employees abroad.

4.4.1.5.2 Sub-Theme 2: Training. Participants from two (both private organisations) of the four focus groups experienced pre-departure training before they left the UK. These participants discussed the training provided by their organisation and the value in receiving training as part of the assignment preparation. What was highlighted by these participants was that it is not sufficient simply to undergo training. The training must be relevant to be beneficial for employees.

> *"they gave us like this presentation called Culture Shock and it was done by these two old BBC journalist blokes. You'd have thought we were going to Iraq or somewhere like that, they were so, you know, you're going to have this, you're going to do that, you know, the people are very standoffish and you kind of thought I'm not sure whether I want to go now, and yet when you got there it was the complete opposite of any of the things they said. They were very old-school British, you know, you will only want to stay with the ex-patriot people, you won't want to make local friends, and yet we were probably quite the opposite"* ($F_3.1_1.98\text{-}106_2$)

Due to receiving no training from their organisation, one participant explicitly stated what they thought training should include. Suggestions included issues around culture and the host country language, which have been raised as important factors in their own right (see Section 4.4.1.3 and 4.4.1.7).

> *"I think that they should have a programme installed within the company that introduces them to the culture, introduces them to the language, allows them to get used to the language and the culture before they go"*
>
> ($F_1.1_1.495\text{-}8_2$)

Overall, despite the various experiences of training, participants appeared to agree that providing pre-assignment training was important and organisation should consider this when using expatriate assignments. Of those who had been through a training programme, participants placed emphasis on ensuring its relevance.

4.4.1.6 THEME 6: NETWORKS & CONTACTS. The sixth theme identified from the focus groups related to networking and contacts. Participants discussed the importance of socialising with people from both the host country and keeping in contact with people from back home. This produced two sub-themes.

4.4.1.6.1 Sub-Theme 1: In-Country. Socialising and networking with people in the host country was considered an important part of the expatriate assignment. Discussions on this topic included activities that participants found helpful, the behaviours of individuals who experienced problems, as well as the impact on their assignments.

Participants agreed that networking and socialising with people in the host country were positive actions. The mixing included socialising with individuals from the host country as well as with other expatriates on assignments too.

> *"Well, yes, it helped mixing with ... obviously the Indian people but also the people from the UK"* ($F_1.1_1.199\text{-}200_2$)

> Participant 1: *"Yes, making friends with the actual ... the people from that country."*
> Participant 2: *"Yes, the locals basically. I think I did, yes, I think that helped a lot."* ($F_3.1,2_1.238\text{-}9_2$)

Participants found socialising with HCNs particularly positive and helpful. They spoke of developing useful networks that allowed them to learn more about the culture and integrate better into the lifestyle. For example, participants found it easier to learn the host country language because of their interaction with HCNs and the increased opportunity to practice.

> *"Well, but on the social side ... I think we all mixed in circles where we had German friends so .. and again the German friends probably spoke better English than we speak German but we all chose those environments to practise the German and to keep it going."* ($F_4.X_1.162\text{-}5_2$)

Overall, participants felt that organisations should be aware of the importance of socialising for potentially helping improve the success of expatriate assignments.

4.4.1.6.2 Sub-Theme 2: With home. Several participants discussed the importance of keeping in contact with individuals back in the UK, including friends or family, through various mediums, such as telephone or internet. This issue was particularly important for those who left their spouse/partner and family back in the UK.

Participant 2: *"one thing that's absolutely vital is that they're allowed contact ... as much contact as possible with their family and friends back in the UK, that's not to say that they're going to be on the phone every five minutes, but certainly ... for example, did you phone home at all?"*

Participant 1: *"Yes, I used to phone home ... I tried to do it once a week sort of thing."* (F_1.2,1_1.489-502_2)

Some participants also expressed the importance of having contact with the organisation in the UK, which relates to the importance of organisational support (see Section 4.4.1.4).

"I think certainly contact is really important, not only with your family and friends but certainly with the company" (F_1.2_1.508-9_2)

Overall, maintaining some contact with family and friends, as well the organisation, was highlighted as an important factor for expatriate assignment success.

4.4.1.7 THEME 7: CULTURE. The seventh theme describes the importance of culture and the cultural differences individuals face on expatriate assignments.

Participants described various difficulties and frustrations that can occur because of cultural differences. Having an awareness and appreciation of the differences was regarded as important for a successful assignment and something an organisation should consider.

> *"Yes, I think that's dead important when you're working abroad. It's definitely learning the culture so that you don't do a faux pas and sort of like upset somebody."* ($F_1.2_1.161$-3_2)

Participants discussed similarities and differences between cultures they encountered when on their assignments. These occur in almost all aspects of expatriates' lives and were difficult obstacles to overcome.

> *"I think being exposed to that different culture has been very beneficial for me, but going through it at the time, it was difficult, very difficult."*
>
> ($F_2.1_1.403$-5_2)

For example, the work culture of the host country differed for many participants. Some participants highlighted the differences in the working hours they experienced, as well as differences in building work relationships.

> *"The style is quite different over there. A lot of it's about making a personal relationship with someone and then a working relationship, once you've got that you're fine, you're virtually laughing and you can get things done, you can get things sorted."* ($F_3.1_1.292$-5_2)

Participants reflected on "small" cultural variations they experienced within day-to-day living. These differences, although regarded as minor, were still necessary for the employee (and family) to learn and live by.

"Germany is not that different to the UK but there are some differences to how they live their lives, some rules that we're not used to, just silly things like when you're allowed to cross the road ... when you can do DIY and when you can do your shopping" ($F_4.X_1.501\text{-}6_2$)

Overall, participants expressed the importance of appreciating and learning the new culture. Participants felt that organisations should consider this when sending employees abroad and be aware of the difficulties and impact they could have on the success of the assignment.

4.4.1.8 THEME 8: AFTER ASSIGNMENT. What happens to expatriates after the assignment was another theme derived from the focus group discussions. The focus groups highlighted two areas that are important for an organisation to consider. These included repatriation of employees, and when employees decided not to return home.

4.4.1.8.1 Sub-Theme 1: Repatriation. Repatriating employees back to the UK was highlighted as another factor for organisations to consider. Discussions included issues relating to the move back to the UK, and returning to work for the home company. Some of the participants expressed feelings that they were not valued when they returned to work in the UK.

"I suppose it sounds horrible because the company did, you know, contribute, but you think I've left my home, my family and everything and I've gone out there to a completely different country and I've learned new things but it didn't feel very appreciated when you got back." ($F_3.3_1.609\text{-}12_2$)

Participants felt that not enough consideration (if any) had been given to this re-entry process of the assignment. Most of the focus groups felt that more could have been done by their organisations in terms of recognising their experience and appreciating all the new information they had acquired from the assignment. Some participants felt that their careers had not progressed since they left, despite the substantial experience they had gained during the assignment. Some participants even felt that their career had gone backwards.

The process of adjusting back to life in the UK was also discussed in focus groups. As the excerpt below illustrates, after creating a new life for themselves and their families, having to relocate again and being confronted with their "old" lives was difficult and quite an unpleasant process for some.

> *"... biggest issue, you know, and everyone else knows, is the coming back, that's the hardest thing in the majority of cases, it's the end of the placement and the coming back and that's a problem for lots of reasons. It's a problem because your expectations as an individual change. It's a problem because you get settled into the new environment and you enjoy the new environment ...... you do establish new friends and in my case a partnership as well, and there are so many things that change during that two-three year, four year period when you've been on an ex-pat, and coming back is very difficult and I know, certainly in my case, coming back as well, I didn't feel I was particularly well looked after when I came back. Whilst I gained a lot from going out there I don't think I particularly gained anything from coming back, and I know everybody in this room for one reason or another had some problems coming back, some more than others, but I found it, as everybody knows, extremely difficult coming back to the UK. I didn't want to come back."* ($F_4.X_1.601\text{-}18_2$)

The difficulties and resistance to returning to the UK led one focus group to suggest the provision of training on this process to help facilitate the re-adjustment process.

> *"Culture Shock training... we could have done with it coming back."*
>
> ($F_3.2_1.154\text{-}5_2$)

Overall, the experience of most participants was that returning to the UK was difficult and typically came without sufficient appreciation or career progression by the organisation. Participants suggested that organisations should consider this issue if they are to have successful assignments, as sometimes they can even be faced with employees who refuse to return.

4.4.1.8.2 Sub-theme 2: Non-Returns. Sometimes employees (and their families) do not want to return home and instead, chose to stay in the host country. Although all participants in the present study returned to the UK, anecdotal accounts were discussed regarding individuals who decided not to return home to the UK. Family circumstances were cited as the main reason why colleagues did not want to return to the UK. In particular, issues relating to children appeared to be significant. If the children had settled in the host country, then it appeared unlikely that expatriated employees would uproot them again to return home.

> Participant: *"Those with children most likely don't want to return for one reason or the other."*
> Participant: *"Well, because the kids get settled there."*
> Participant: *"The kids get settled"*
>
> *($F_4.X_1.642\text{-}5_2$)*

Participants also commented on the fact that quality of life was sometimes much better than in the UK. As a result, some employees were not prepared to leave and return home to a much lower standard of living. According to one participant:

"you always run the risk that people won't want to come back because they actually enjoy it." ($F_4.X_1.640\text{-}1_2$)

Overall, although a relatively minor theme within the data, participants felt that organisations need to be aware of and prepare more for situations where employees do not want to return to the UK. No solutions were discussed, but participants felt the consideration by organisations on this issue may help may reduce expatriate failures.

4.4.1.9 THEME 9: ADJUSTMENT. The final theme in the focus groups data related to the experience of having to adjust to living in a different country. Participants spoke of the process of adjusting to the new country, including the phases they went through. The beginning of the assignment appeared to be the most challenging involving the experience of cultural fatigue from a sustained period of culture learning.

> *"You hear about culture shock which is the difference between here and there, and that can be entertaining at times, but culture fatigue is that ... every day you have to face that, every day when you come to a lift nobody is going to make way for you as you get out of the lift, they're all going to try and get into it, or whatever, that happens day after day after day after day, and those sort of things wear you down"* ($F_2.4_1.383\text{-}388_2$)

"The first nine months were very difficult." ($F_4.X_1.104_2$)

Although the least prevalent theme, participants still highlighted the issue of adjustment as an important area that organisations should consider. Links were made by participants to earlier themes already discussed, including training and support (see Sections 4.4.1.5.2 and 4.4.1.4), which participants thought could help mitigate some adjustment issues for employees.

4.4.2 Unexpected responses. Another theme was derived from the focus group data, which was an unexpected result. The theme related to the employee's perspective of what they considered an important aspect to consider in relation to expatriate assignments.

4.4.2.1 THEME 1: GO ON ANOTHER ASSIGNMENT. Three of the four focus groups raised the issue of whether or not they would go on another assignment. The conversations appeared to naturally move onto this issue and participants discussed whether this would be something they would do again.

> "There was one question that perhaps you should ask us all, it's would we do it again" *($F_4.X_1.708\text{-}709_2$)*

Participants felt this was an important factor to consider when considering a successful assignment, with some perceiving this to be the most important question.

> *"You forgot to ask the most important questions...would we go on another?"* *($F_2.X_1.X_2$)*

This issue was not raised by the researcher in any of the focus groups, but was highlighted as an important question that should be asked. The consistency of perceived importance highlighted this as another potentially valuable insight from the expatriated employee perspective.

4.5 Summary and Conclusion

The present study elicited information on factors contributing to successful expatriate assignments from the perspective of British expatriated employees. Using this perspective provided rich, first-hand knowledge of expatriate assignments, and suggested ways to improve expatriate success rates. Information gained from this perspective is regarded as important (Brewster & Scullion, 2007) but currently remains absent from the literature. Four focus groups were conducted and the results of an inductive thematic analysis revealed nine main factors. In order of prevalence, these factors related to: (i) the individual employee; (ii) the employee's spouse/ partner and family; (iii) language issues when in the host country; (iv) the importance of organisational support; (v) prior-knowledge; (vi) networks and contacts; (vii) culture; (viii) what happens after the assignment; and (ix) adjustment to the host country. Several of these themes contained sub-themes, forming a hierarchical structure of factors for successful expatriate assignments (see figure 4.1). Also, an unexpected finding resulted, which highlighted the importance for considering whether or not expatriates would go on another assignment. These results provide a number of key factors that resonate with existing expatriation literature. Due to the number of factors revealed from the analysis, however, this research literature will be discussed in more detail in the following chapter (see Chapter 5), including implications of the findings.

One observation by the researcher was that the focus group held with employees from within the education sector placed greater emphasis on organisational issues, namely a lack of provisions in comparison to other multinational organisations. This was an observation also noted by Vance (2005) who interviewed self-initiated expatriates. It has been suggested that educational and academic samples are a self-initiated expatriation group (Richardson & McKenna, 2002) and represents a distinct kind of expatriate (Inkson, et al., 1997). Moving overseas to work at a different university reflects a more voluntary move as opposed to a specific posting requested by the organisation. Self-initiated expatriation, or non-corporate-sponsored expatriates (e.g. Bozionelos, 2009), are considered different not only because of different levels of organisational support, but also because they have been motivated by the individual, which may not always be the case in corporate expatriate assignments. Given this, academic expatriate populations should be a separate population from corporate expatriates and will not included in the samples for the subsequent research phrases of the present thesis.

Overall, the findings from the first phase of the research provide useful insights into the underlying factors for expatriate assignment success from the perspective of British expatriated employees. The study contributes to the relatively little work that has been conducted from the British expatriate employee perspective. However, the validity of these factors must be studied in future research. Research should seek to validate these factors against various outcomes of an expatriate assignment to ascertain their importance for successful expatriate assignments. The following chapter discusses the identified factors in greater detail with reference to existing literature. This selective literature review poses additional research questions and hypotheses to be answered in a subsequent research phase, which seeks to assess quantitatively the importance of these factors in a larger corporate expatriate sample.

5. Focused Literature Review

This chapter presents a review of the research literature on the factors highlighted from phase one. The review includes an examination of the various conceptualisations of expatriate assignment success in light of the new perspective on expatriate assignment success raised in phase one, which give rise to a new model of British expatriate assignment success.

5.1 Literature Review of the of the Identified Factors

Participants in study one identified nine factors that were important for organisations to consider in relation to successful expatriate assignments. These factors reflect individual, organisational, and contextual-level factors. The research literature on these factors is presented below in order (Sections 5.1.1 – 5.1.9).

5.1.1 The Individual. Characteristics of the expatriate are the most frequently cited factor that impacts on whether an expatriate assignment will be successful or not. Within the research literature, these factors have received the most attention from researchers, resulting in a wealth of investigations on individual-level variables. Study one noted the importance of considering an expatriate's personality.

5.1.1.1 Personality characteristics. Academics (Ones & Viswesvaran, 1997) human resource managers (Cheng & Lin, 2009), HCNs (Sinangil & Ones, 1997), expatriates (Arthur & Bennett, 1997) and repatriates (Anderson, 2005) have all recognised the importance of personality in predicting expatriate success. Much of the early empirical work looking at expatriate personality characteristics was carried out on Peace Corps volunteers in the US. For example, Grande (1966) conducted research on 58

Peace Corps volunteers and found that self-esteem and self-reliance were related to higher peer-reviewed performance. Other characteristics found to be important include authoritarianism (Mischel, 1965; Smith, 1965), anxiety (Mischel, 1965), self-acceptance (Grande, 1966), interpersonal values (Gordon, 1967), patience, tolerance, perseverance, reliability, courteousness (Harris, 1973), and personal orientation (Dicken, 1969). These findings resulted in the publication of lists of individual attributes important for expatriates. For example, Ronen (1989) assembled a list of 53 attributes considered to be important for an expatriate, based on the literature from four groups of overseas professionals (military personnel, technical assistance personnel, business men and women, and Peace Corps volunteers). These attributes included openness, outgoingness, intellectual curiosity, perseverance, tolerance for ambiguity, and emotional stability.

Empirical studies from other expatriate employee groups have also highlighted the importance of personality characteristics. These included cultural flexibility, social orientation, willingness to communicate, collaborative conflict resolution style (Black, 1990a), communication competence, cultural empathy (Cui & van den Berg, 1991), self-efficacy (Palthe, 2004; Shaffer, Harrison, & Giley, 1999), showing patience and tolerance, responsible problem solving, and social involvement with HCNs (Selmer, 1999a). Many of these empirical studies have been jointly examined using meta-analytical techniques in attempts to explore factors relating to expatriate adjustment. Results have supported the importance of individual personality characteristics with significant relationships to expatriates' level of adjustment on assignments found (e.g. Bhaskar-Shrinivas, et al., 2005; Hechanova, et al., 2003).

Overall, there has been considerable amount of evidence that personality plays an important role in expatriate assignment success. However, one major criticism of the early research in this area was the relative dearth of empirical studies (Deller, 1997) and the literature being largely "speculative and non-empirical" (Sinangil & Ones, 2001, p. 426). Many researchers put forward their own propositions about important characteristics without empirically testing their impact on expatriate assignment outcomes. Also, reviews have been criticised as not distinguishing between conceptual proposals and empirical evidence (e.g. Hammer, Gudykunst, & Wiseman, 1978; Ronen, 1989). Dowling and Schuler (1990) claim that recent papers continue to "uncritically summarise the existing literature without theoretical or methodological concerns" (p.51). This includes the criticism that the body of research on expatriate personality has included "inadequate or nonexistent operationalisation of variables" (Deller, 1997, p.98). A wide variety of predictor variables have been adopted by researchers, with many being poorly defined. A lack of clarity and understanding surrounding the meaning and measurement of predictor variables has led to confusion and discouragement of the research in practice (Deller, 1997).

Some researchers argued that personality-based assessments are not likely to be fruitful for selection purposes (e.g. Harris, 1973; Harris & Harris, 1972). Early expatriate selection research received criticism for being "fragmented" and "discouraging" (Ones & Viswesvaran, 1997, p. 69) and many researchers dismissed the potential of finding selection criteria for overseas success. According to Ones and Viswesvaran (1997), academics who focused on these individual-level characteristics did not acknowledge the underlying personality foundation of these predictors, with "hodge podge" (p.69) lists of predictor variables and a distinct lack of a unifying theme. These criticisms contributed to a change in expatriate personality research, which included using a theoretical model of personality.

Ones and Viswesvaran (1997) proposed using the Five Factor model of personality as it would provide a more consistent and accurate way to operationalise and investigate personality variables. Within the field of personality research, scholars now agree that a five-factor structure adequately represents the basic dimensions of personality (Woods & Hardy, in press). Although the Five Factor model of personality (the Big Five) is not universally accepted (Block, 1995; Hough, 1992), there is convincing empirical evidence of the utility of the model, including from meta-analytic research. For example, significant empirical relationships have been found between personality factors and job performance (Barrick & Mount, 1991; Hough, Eaton, Dunnette, Kamp, & McCloy, 1990; Ones, Viswesvaran, & Schmidt, 1993). As a result, the model is perceived to "provide a launching pad in understanding any literature where personality measures are used" (Ones & Viswesvaran, 1997, p.72) and is supported as a credible and adequate taxonomy of personality for the majority of theoretical and practical applications (Costa & McCrae, 1995; Goldberg, 1993), including expatriation (Mol, et al., 2005).

Today, the Big Five model comprises of emotional stability, extraversion, conscientiousness, agreeableness, and openness to experience. Arthur and Bennett (1997) proposed that emotional stability relates to how well an expatriate can cope with the daily stresses of living in a new cultural environment, and in turn, whether they are likely to cope and adapt to the new country. Extraversion was proposed to influence an expatriate's level of excitement and sensation seeking abroad, as well as leading people. Someone with high extraversion would be more likely to accept an expatriate assignment, and have a positive influence on performance abroad, specifically leadership performance. Similarly, someone who is low in openness would find it difficult to relate to and interact with people different from themselves. Being able to relate with others requires an expatriate to show a degree of agreeableness in order to facilitate building relationships with HCNs. Finally, conscientiousness was proposed to relate to expatriate job performance, similar to domestic performance. More care and attention will be carried out on the tasks and roles by highly conscientious expatriates, thus producing better performance than those low on conscientiousness.

Empirical research has supported the utility of applying the Big Five framework to expatriation research (Sinangil & Ones, 2001). For example, combinations of factors have been found to be significantly related to a number of expatriate outcome criteria, ranging from willingness to accept an expatriate assignment (Aryee, et al., 1996), adjustment on the assignment (e.g. Caligiuri, 2000; Huang, Chi, & Lawler, 2005; Parker & McEvoy, 1993; Swagler & Jome, 2005), the desire to terminate an assignment, and performance (e.g. Caligiuri, 2000; Stierle, et al., 2002). Relationships between personality traits and these criteria have also been demonstrated in several different nationalities of expatriates, including Arabian (Dalton & Wilson, 2000), German (Stierle, et al., 2002), Singaporean and Australian (Ward, Leong & Low, 2004). Mol et al (2005) explored the predictive validity of the Big Five in expatriate performance using a meta-analysis and found the Big Five model to have similar predictive validity to that reported for domestic employees. As a result, this model of personality has been hailed as a useful model to adopt within expatriation research and practice, and the results of study one suggest that personality is also a key factor in British expatriates.

5.1.1.2 Interest and desire to go abroad. Having an interest or desire to go abroad is an intuitive factor relating to successful expatriate assignments. Early research by Tung (1981) explored the selection criteria used by organisations for various categories of jobs and found that having an interest in going abroad was used and/or considered important for different job categories. For self-initiated expatriates, the decision to expatriate has been found to be predominantly due to the individual's desire to travel and have an adventure (e.g. Richardson & Mallon, 2005). Empirical research has also suggested that expatriate managers' level of adventurousness is significantly related to willingness to accept a global assignment in the first instance (Konopaske, Robie, & Ivancevich, 2009). More recently, research has shown that an expatriate's cross-cultural motivation is related to their effectiveness abroad (Chen, Kirkman, Kim, Farh, & Tangirala, 2010). However, despite the intuitive importance of a successful expatriate having the initial desire and interest to go abroad, there is relatively little empirical research specifically examining this factor. This may be due to the strong overlap with personality, specifically with the personality trait of openness to experience. Another illustration of the close conceptual overlap between interest to go abroad and personality can be seen by Frieze and Li's (2010) description of individuals with the desire to emigrate as having a "mobile personality".

5.1.2 Spouse/partner and family. Family is an important factor in expatriate assignment outcomes. Despite early acknowledgements of the role of the family the expatriation context (e.g. Cleveland, Mangone, & Adams, 1960; Hays, 1971, 1974; Nash, 1967, 1969), it was not until the early 1980s when Rosalie Tung provided an influential insight into the significance of families on expatriate assignment outcomes (Tung, 1981, 1982, 1984). Today, "normadic" or "nuclear families" are still considered to be a key factor in the success of expatriate assignments. A review by Tungli and Peiperl (2009) explored expatriate situations across various countries found that family difficulties still dominate the reasons for early returns in the US and Europe, including the UK.

The presence of the family on an assignment can have both positive and negative effects on expatriates (Le, Tissington, & Budhwar, 2010). For example, family support has been identified as an important source of support for expatriates dealing with work-related stress (Caligiuri, Hyland, Joshi, & Bross, 1998; Guzzo, Noonan, & Elron, 1994; Harvey & Buckley, 1998; Kraimer, Wayne, & Jaworski, 2001; Lu & Cooper, 1995; Tung, 1981). Negative effects can include reciprocal damaging influences on individual family member's psychological states (Brett & Stroh, 1995), as well as the overall family's level of adjustment (Brett & Stroh, 1995; Caligiuri, et al., 1998; Takeuchi, Yun, & Tesluk, 2002). Such family adjustment relationships can impact negatively on the expatriate's assignment outcomes (e.g. Black, et al., 1991; Black & Stephens, 1989; Caligiuri, 1995; Caligiuri, et al., 1998; Forster, 1997; Fukuda & Chu, 1994; Harvey, 1985; Stierle, et al., 2002; Yang, 2007). Literature surrounding this topic typically uses terms such as "crossover effects" to describe cross-member (e.g. spouse-expatriate) influences and "spillover effects" to describe cross-boundary (e.g. home-work) influences (e.g. Takeuchi, Yun, & Tesluk, 2002; Van der Zee, Ali, & Salmone, 2005). Such effects typically occur because of the challenges and personal difficulties encountered from the relocation, and a number of theories are often used to try to explain such family dynamics within the expatriate context.

Expatriate family members are thought to experience both similar and different difficulties and challenges (Stuart, Ward, Jose, & Narayanan, 2010). An advantage the expatriate employee has over family members however, is the routine and social support of the new role in the host organisation (Fukuda & Chu, 1994). In absence of this, it is often the family who experience the greatest impact and difficulty of the relocation (Caligiuri, et al., 1998; Chowanec & Newstrom, 1991). However, challenges of the new role for the expatriate, whilst frequently viewed as positive (Feldman & Tompson, 1993) do require effort by the expatriate to overcome. For example, expatriates may need to work longer hours, socialise more with host national colleagues, and develop culturally consistent behaviours to perform adequately within their work role (Caligiuri, Hyland, & Joshi, 1998). The increased demands and efforts required within the work domain are believed to impact negatively within the family domain. The reduction in time and resources available for providing support to family members may result in conflict for the expatriate employee. The expatriate is torn between their role within the work domain and the commitment to family member well-being (e.g. Aryee, Luk, Leung, & Lo, 1999; Hechanova, et al., 2003). Challenges for expatriate employees' work-life balance, or work-family reconciliation (as termed within Europe, e.g. Yang, 2007) can create serious issues for expatriates and the assignment outcomes. For example, Shaffer, Harrison, Gilley, and Luka (2001) found that expatriates' struggles to balance work and family are strongly related to their intentions to leave assignments. High involvement work systems has also been found to relate to higher work-family conflict and in turn, lower expatriate job satisfaction and performance (Shih, Chiang, & Hsu, 2011). The role of perceived justice and conflicts impact upon the expatriate couple's level of adjustment (Van Erp, Giebels, Van Der Zee, & Van Duijn, in press), and the effects of work-family facilitation and family satisfaction have been found to influence retention rates of expatriates (Mustapha, Ahmad, Uli, Idris, & Idris, 2010). From study one of this research, the expatriate's partner's personality was raised as an important factor for expatriate assignment success.

5.1.2.1 Spouse/ partner personality. The role of the accompanying partner or spouse has been recognised by researchers but is still frequently ignored by organisations (Anderson, 2005). Often referred to as the "trailing spouse", these family members may be confronted with more challenging obstacles than the expatriate (Adler, 2002; Cohen, 1977; Harvey, 1985; Hiltrop & Janssens, 1990; Selmer & Leung, 2003; Tung, 1982). Spouses may perceive the stay abroad as a beneficial opportunity (Chowanec & Newstrom, 1991; Van der Zee, Ali, & Salome, 2005) but dramatic changes in their lifestyles and roles can often contribute to feelings of low self-esteem and well-being (Van der Zee, et al., 2005). For example, spouses often suffer from severe disruptions to their social support networks, their role and their personal identity (Kupka & Cathro, 2007). With many couples today depicting a "dual-income" or "dual-career" household, the requirement of giving up their work roles can place even greater emotional strains or disappointments on the partner (Haselberger & Brewster, 2008). The stress of relocating has also been found to be higher for couples who are in dual-career marriages (Munton, 1990). Spouses are often faced with a reversion to a more traditional role as a caregiver and housekeeper (Van der Zee, et al., 2005). Without the structure and support resources available to the spouse that are present to the expatriate from their new work role, the accompanying spouse can be left feeling unhappy and disgruntled with the relocation.

Accepting the influence of the spouse on the expatriate and assignment outcome, research has begun to turn to the antecedents of spouse adjustment. Ali, et al.

(2003) explored potential determinants of spouse adjustment on a sample of predominantly European spouses. Controlling for various demographic variables, results indicated that spouse personality was the most important predictor of spouse adjustment, especially open-mindedness and emotional stability. These findings support those by Mohr and Klein (2004), who conducted 14 interviews with US spouses residing in Germany. Spouses highlighted the importance of personality traits, specifically openness, in contributing to the spousal adjustment process. When examined quantitatively, positive (non-significant) relationships with spouse adjustment were found. Given the reciprocal effects between the spouse and the expatriate employee highlighted above, the importance of the spouse and their personality disposition can be seen as an important aspect to consider for spouse and expatriate employee adjustment, as well as the overall outcome of the assignment.

5.1.2.2 Children. Acknowledgement of children in cross-cultural environments dates back several decades. These TCKs or "global nomads" (McLachlan, 2007), face equally difficult and challenging obstacles to those of the parents that can invoke various fears and concerns about their acculturation process (Brionesa, Tabernerob, & Arena, 2011). Children have to leave their schools and friends to go to an unfamiliar country, often comprising of different schooling systems and requiring the child to learn a new language. Forster (1997) received reports from spouses who were four months into the expatriate assignment that their children had particular difficulties with adapting to new schools and making new friends.

The presence of children within the expatriate family is believed to have a strong influence on the parents (Van Der Zee, Ali, & Haaksma, 2007). For example, Kupta and

Cathro (2007) suggested that children can give non-working spouses a source of stability and provide the opportunity to become acquainted and involved with the local community through daily, social activities of their children (e.g. nursery). In turn, this has been suggested as helping spouses with identity problems. Therefore, the increased demands placed on parents by having children may also be beneficial. Such parental demands have been categorised into four levels by Shaffer and Harrison (2001). The lowest level of demand is on parents who have no children accompanying them on the assignment. The next level of demand occurs when accompanying children are 19 years or older. The third level occurs when accompanying children are aged between 6 and 18 years because children going through puberty are believed to face additional emotional problems (Stuart, 1992). Finally, the greatest level of parental demand is believed to occur when accompanying children are 6 years or younger due to their high dependence on the parents. Gaylord (1979) suggested two particular age groups sensitive to the relocation: i) young children aged between 3 to 5 years who often perceive the relocations as punishments; and ii) children aged between 14 to 16 years who suffer due to the loss of their circle of friends. This latter situation places a particularly high amount of demand on the parents that can break up the family unit (Kupta & Cathro, 2007).

As noted earlier, the spillover effects from the family can impact negatively on the outcome of an assignment. Researchers posit expatriate children well-being may influence the expatriated employee's job performance (Caligiuri, et al., 1998) and successfully completing the assignment (Fukuda & Chu, 1994; Yurkiewicz & Rozen, 1995). Research into the adjustment of children, however, is still in its infancy (with some exceptions, e.g. Breiden, Mohr, & Mirza, 2006; Van Der Zee, et al., 2007), which may contribute to organisations often neglecting children in the move (De Leon & McPartlin, 1995). The results from study one also provides some support for the importance of considering children in the move.

5.1.2.3 Spouse/ partner and family remain in UK. A number of expatriates with families or partners decide to move abroad alone and leave their loved ones behind. A recent global relocation trend survey revealed that 17% of expatriates leave their families behind (GMAC, 2008). Despite being in the minority, a proportion of expatriates choose to have "live-together-apart" relationships (Haskey & Lewis, 2006) and travelling the long distances to see one another. More British citizens than ever before are accepting and enduring longer commuter distances (Green, Hogarth, & Shackleton, 1999), and may be due to the increase of dual-income households (Green, et al., 1999).

Leaving the family at home and choosing the living-together-apart option can hold many benefits for families. For example, minimal disruption will be placed upon the partner/ spouse and children who remain at home, as well as partners being able to keep their jobs. For the household, improved financial income with only one individual commuting long-distance as opposed to the whole family migrating are seen as overall benefits (Green, et al., 1999). These benefits however, may be outweighed by the number of costs involved with leaving the family behind. Long-distance commuting costs can include increased expenditure on travelling, incursions into leisure time, and the additional physical and mental stresses and strains imposed by longer journeys to work (Pickup & Town, 1983 cited in Green, et al., 1999). The sample in study one felt this situation was also important for organisations to consider.

5.1.3 Language. Language differences between home and host countries are an obstacle faced by many expatriates when they relocate. However, the necessity of expatriate language skills has been questioned for a long time. Speaking the host country language has been an assumed competence deemed critical for expatriate assignment success (Jordan & Cartwright, 1998). According to Caligiuri and Tarique (2005), this association stems from contact theory that asserts that the ability to speak the native language is important for communication. This allows expatriates to develop interpersonal relationships and acquire information from diverse sources (Kim & Slocum, 2008). Research has shown that consistency in English management communication within multicultural departments can have strong relationships with group cohesiveness (group involvement, group conflict and group trust, Lauring & Selmer, 2010). From this, expatriate adjustment is believed to be facilitated and assignment success enhanced. Numerous studies have looked at language ability and its relationship with expatriate adjustment, and a positive relationship appears to exist (e.g. Puck, Mohr, & Rygl, 2008). However, some studies have found that language skill are positively related to work adjustment and interaction adjustment (Kraimer & Wayne, 2004; Nicholson & Imaizumi, 1993; Shaffer, et al., 1999), whereas others have found no significant positive relationships (e.g. Takeuchi, Yun, & Russell, 2002).

There are a number of reasons for such mixed findings. One explanation is that not all assignments require the expatriate to speak in the host country language (Caligiuri & Tarique, 2005). For native English-speaking expatriates, the necessity of learning a second language could be lessened by English being the lingua franca of international business (Puck, et al., 2008; Jordan & Cartwright, 1998). As a result, native-language competence may be more important for non-native English speakers going to English-speaking countries than for English speaking expatriates going to non–English speaking countries (Bhaskar-Shrinivas, et al., 2005). Another reason may be because language encompasses nonverbal elements in addition to vocabulary and grammar. According to Hall (cited by Imai, 1996), 60% of communication is nonverbal. In discussing the importance of language and subsidiary control, Björkman and Piekkari (2009) defined language competence as both "grammatical and communicative competence" (p. 107). These authors follow the early position of Hymes (1971) who argued that both forms of competence are necessary to demonstrate competency in a language, as it is culturally embedded and expressed through cultural meaning systems. This makes language highly context-specific, and grammatical competence (the mastering of the grammar and syntax) is not enough to be able to communicate in a meaningful way. Therefore, it is important for an expatriate to use their own tacit knowledge and ability to apply language in a culturally appropriate way. It could be suggested that having both host country language skill and nonverbal communication skill contribute both to the grammatical and communication competencies.

Of the various expatriation reviews (e.g. GMAC, 2008; Peterson, et al., 1996, 2000; Tungerli & Peiperl, 2009), language problems are not typically cited as a main reason for expatriate assignment failure. However, the results of study one suggests that language may contribute to the expatriate assignment success in British employees and should be considered by the organisation.

5.1.4 Organisational support. The relationship between organisational support and employee work outcomes has been the subject of research for many scholars. Support from the organisation reflects one source of social support an employee may access (others include colleagues, supervisors, family and friends, Caplan, Cobb, French, Harrison, & Pinneau, 1975). It is also considered to be an important source of support for an expatriate (Kraimer, et al., 2001). Evidence suggests that an employees' perception of organisations displaying support can lead to more positive work outcomes (Liu, 2009). These outcomes include increased organisational commitment (Liden, Wayne, Kraimer, & Sparrow, 2003; Liu, 2009), attendance rates, job performance (Eisenberger, Fasolo, & Davis-LaMastro, 1990; Eisenberger, Huntington, Hutchinson, & Sowa, 1986), prosocial behaviours (Eisenberger, et al., 1990; Shore & Wayne, 1993; Wayne, Shore, & Linden, 1997), organisational citizenship behaviours (OCBs) (Moorman, Blakely, & Niehoff, 1998; Shore & Wayne, 1993) as well as lower rates of turnover intention (Wayne, Shore, & Liden, 1997).

The concept of perceived organisational support (POS) was proposed by Eisenberger and colleagues (1986) describing it as the extent to which an employee perceives an organisation to value their contributions and cares about their well-being. The authors proposed that higher POS will augment an employee's expectancy and provoke a commitment to repay the organisation. As a result, the organisation is rewarded through the employee eliciting greater effort toward meeting the organisational goals. According to Rhoades and Eisenberger (2002), POS is a valuable resource as it assures employees that help is available from the organisation when needed to enable them to work effectively and deal with stressful situations. Payne (1980) noted the arguments made for organisational support as an important determinant of employee adjustment following a transfer. Stress management researchers have also highlighted the important role of social support in assisting individuals reduce uncertainty when faced with novel situations (e.g. Ashford & Taylor, 1990; Feldman & Brett, 1983; Fisher, 1985; Pinder & Schroeder, 1987). Given the extreme novelty of an overseas transfer, the support provided by the organisation may play a significant role in the success of the assignment and a number of researchers have begun to explore empirically the importance of POS for expatriate assignments. Results so far reflect those of domestic research, including positive relationships with adjustment (Caligiuri, Joshi, & Lazarova, 1999; Shaffer, et al., 1999; Wang & Takeuchi, 2007), repatriation processes, turnover (Kraimer, Shaffer, & Bolino, 2009; Stahl, Chua, Caligiuri, Cerdin, & Taniguchi, 2009), and negative relationships to work stress and intention to return early (Wang & Takeuchi, 2007).

Kraimer and Wayne (2004) investigated expatriate POS as a multi-dimensional construct. Within their research, expatriate POS was found to comprise of three distinct dimensions of global POS: financial POS ("the extent to which the organisation cares about the employee's financial needs and rewards the employee's contributions in terms of compensation and employment benefits" (p. 219)); career POS ("the extent to which the organisation cares about the employee's career needs" (p. 219)); and adjustment POS ("the extent to which the organisation cares about the employee's (including family) adjustment following a job transfer" (p. 218)). When this multi-dimensional conceptualisation of expatriate POS was empirically tested to explore the relationship between various expatriate assignment outcomes, support was demonstrated for the importance of POS for expatriate assignment success (intention to remain on the assignment, adjustment, and performance, Kraimer & Wayne, 2004).

Although initial findings from this expatriation research appear to support the role of the organisation and POS, further theoretical and empirical work is warranted (Kraimer, et al., 2001). Study one highlighted the importance of organisational support for successful expatriate assignments for British employees. These results are in keeping with a study by Wang and Nayir (2006), which found POS to be important on European expatriate's adjustment. These authors highlight the importance of acknowledging the difference between Europe and the rest of the world, supporting a rationale for more research on European expatriate POS and its significance on expatriate assignment success.

5.1.5 Prior knowledge. Having information about the expatriate assignment before leaving was another important factor highlighted in study one. Specifically, results were separated into two topics: 1) training; and 2) expectations.

5.1.5.1 Training. Training has been defined as "any intervention aimed at increasing the knowledge and skills of individuals, so as to help them cope better personally, work more effectively with others, and perform better professionally" (Kealey & Protheroe, 1996, p. 145). Within the expatriation context, training aims to help employees successfully transfer across cultural borders (Bhagat & Prien, 1996). Typically referred to as cross-cultural training (CTT), Brislin and Yoshida (1994) described this genre of training as formal efforts to help prepare these individuals for effective interpersonal relations and success on the job when interacting with members of a different culture form their own. CCT is thought to represent an important step after selection has taken place (Chew, 2004), and has received much attention in the expatriate research literature.

CCT methods developed from initial work by Harrison and Hopkins (1967) and Mitchell and Foa (1969). These researchers made innovative contributions to experiential methods and assimilator methods of expatriate training, respectively. Research on these methods and concepts continued over the 1970s and consolidated the field of CCT within research and practice (Bhawuk & Brislin, 2000). Research on other methods included culture assimilators (e.g. O'Brien, Fiedler, & Hewett, 1970) and experiential methods, such as area simulation (e.g. Trifonovitch, 1977), and the cultural self-awareness model (e.g. Kraemer, 1973, 1974, cited by Bhawuk & Brislin, 2000). The 1980s saw a subsidence in the volume of research being conducted on CCT, as popularity in the field waned (Littrell, Salsa, Hess, Paley, & Riedel, 2006). However, according to Bhawuk and Brislin (2000), the field of CCT matured and became more integrated through further publications, despite the lack of research. The increase in globalisation of the economy during the early 1990s caused a re-surge in cross-cultural research (Littrell, et al., 2006). This research was mainly focused on evaluating CCT programs. Today, research on CCT continues mainly due to controversies regarding the effectiveness of CCT. The most notably of which surrounds the notion of effectiveness.

A number of CCT typologies and methods have been produced. Brislin (1979) identified three methods of CCT described as cognitive, affective and behavioural. The cognitive method refers to a dissemination of information, using conferences or non-participative sessions on a foreign cultural environment. The affective method aims to provoke individual reactions so individuals can learn to deal with critical cultural incidents. Whereas the behavioural method aims to improve individuals' capacity to adapt their communication style and establish positive relationships with members of another culture. Similarly, Mendenhall et al. (1987) distinguished between three types of training, which included information giving approaches, affective approaches that address people's feelings as well as facts, and immersion approaches, which are in-depth methods covering a broad range of topics and methods. Gertsen (1990) proposed a typology containing four training types derived through a combination of two dimensions: 1) the kind of training; and 2) the orientation of training. Regarding the former, Gertson divided training in two. The first was conventional training, whereby information is communicated via a unidirectional medium (such as in schools and universities). The second was experimental training, in which trainees experience simulations of real life situations. Possible orientations of training were: (1) a culture-general focus, which aims to sensitise trainees to the notion of culture; or (2) a culture-specific focus, which aims to make trainees more competent in a particular culture. Littrell, et al. (2006) noted the increase in CCT approaches overtime, and most recently proposed seven approaches to CCT, including attribution, culture awareness, cognitive-behaviour modification, interaction, language, didactic, and experiential training.

Training can also occur at various stages of the expatriate assignment, including pre-departure, post-arrival, or a combination of both. A debate exits over which is best (Black, et al., 1999). It has been argued that pre-departure training equips the employee (and family members) with more realistic expectations about the assignment. This is assumed to reduce anxieties about the new destination and giving greater confidence about being successful. For post-arrival training, supporters argue that assignees have issues they are currently experiencing, which can be brought to the training. Also, individuals' learning readiness is often at its peak through being immersed in the cultural and transitional challenges, which allows greater achievements and outcomes from the training (Black, et al., 1999). There are even suggestions that re-entry training be provided to assist individuals with their return to their home country, tackling what has been described in the literature as "reverse culture shock" (e.g. Chew, 2004). The most common form of CCT provided by organisations remains the pre-departure. However, Tungli and Peiperl (2009) compared the amount of pre-departure training provided by

US, Germany, Japan and the UK, and results revealed that the UK provides the lowest amount of training out of these countries. This low level is consistent with an earlier review by Peterson et al. (2000). This disparity between the strong academic support for CCT and organisational utilisation of CCT could stem from organisations' scepticism of CCT effectiveness.

A large corpus of research on CCT literature has been published over the decades. However, the majority has largely been conceptual or anecdotal in nature (Littrell, et al, 2006). Of the fewer empirical studies, most support the view that CCT facilitates expatriate assignment success (Selmer, Torbiörn, & de Leon, 1998). However, some have observed either no influence or a negative impact on expatriate assignment outcomes, such as adjustment (e.g. Black & Gregersen, 1991; Gregersen & Black, 1992; Kealey & Protheroe, 1996) or performance (Chemers, 1969; Mitchell & Foa, 1969; Weldon, Carlston, Rissman, Slobodin, & Triandis, 1957). This has led to perceptions that evidence regarding CCT effectiveness is inconclusive (Selmer, 2005). Academics have noted these mixed results and attempted to review and summarise the literature. One of the earliest and frequently mentioned reviews was conducted by Black and Mendenhall (1990). This paper reviewed 29 studies to determine whether CCT was effective in developing the skills related for maintenance of the self, the skills necessary for interacting with host nationals, and the cognitive skills necessary for cultural awareness. Overall, positive results were revealed and the authors hailed support for CCT.

Following on from the extensive review of Black and Mendenhall (1990), Morris and Robie (2001) performed an advanced statistical review of the available data as opposed to a theoretical review. Through meta-analysis, Morris and Robie investigated more specific performance measures than the earlier review. Performance was measured using ratings of cross-cultural skill development, early return rates, and supervisor ratings. They also examined the relationship between CCT and adjustment, including both work adjustment and general adjustment to the host culture. Significant positive relationships were observed between CCT and expatriate performance (r =.26), and between CCT and adjustment (r = .13). Despite these positive findings, doubts have been cast as to their accuracy. Kealy and Protheroe (1996) claimed that most of the supporting studies contained flawed methods. Caligiuri et al. (2001) also highlighted that most investigations have studied other sojourners and not business expatriates, making the generalisability of the findings doubtful in the corporate context.

Phase one of the present research highlighted the importance of training. However, emphasis was placed on the relevance of the training as a determining factor for CCT having a positive influence on expatriate assignment outcomes. The research literature is sparse on the issue of training relevance within the expatriation field. However, research by Caligiuri and colleagues (2001) has considered and measured this aspect of training. Its function is seen as appropriately aligning employees' (and their families') expectations with the assignment (Littrell & Salas, 2005). These researchers explored the relationship of US expatriate perceptions of CCT relevance on expatriate adjustment. Results suggested a significant positive correlation between these variables, providing support for the belief that relevant training facilitates adjustment by helping facilitate more congruent expectations. These findings support the responses by participants in study one and warrant further investigation.

5.1.5.2 Expectations. Upon receiving confirmation of being posted on an expatriate assignment, employees begin forming expectations about the assignment. The typical assumption is that having expectations can better prepare the employee for their expatriation experience. In comparison to other predictors of expatriate assignment success, expatriate expectations have received relatively little attention by researchers. As a result, theory has been borrowed from other disciplines to help understand the process of forming expectations and how they may influence the outcomes of expatriate assignments (Harvey, Buckley, & Novicevic, 2007).

Harvey, Bolger and McClelland (1994) noted the absence of research on expectation formation within the management field and decided to capitalise on the rich body of literature from the economic field. They posited three (economic) views of expectation formation: i) extrapolative expectations, which suggest individuals use patterns of past performance or experience to derive an expectation for future experience or performance (Vega-Redondo, 1989); ii) adaptive expectations, which takes into account different weightings individuals may place on specific experiences when creating their future expectations (e.g. an expatriate may assign a low importance weighting to a recent bad assignment because of the circumstances under which the assignment took place); and iii) the rational expectation view, which proposes that individuals consider all relevant information when forming expectations, not just past performance or weighted interpretations of past performance. Expectations are formed in complex ways through the provision of appropriate or relevant information about the expatriate assignment. Without relevant information, Caliguiri, et al. (2001) noted that individuals will use mental short cuts, such as stereotypes to formulate expectations. Within the context of expatriate assignments, stereotyping causes expatriates to categorise all HCNs on the basis of their nationality. This can create over-generalisations about HCNs and although useful for processing information in novel situations, stereotypes can also create inaccurate expectations. The mismatch between expatriates' expectations and reality may produce unmet expectations that in turn could potentially impede the expatriate (Caligiuri, et al., 2001). It is believed that organisations can assist employees and shape their expectations appropriately (Harvey, et al., 2007).

In an in-depth review of absenteeism and turnover literature, Porter and Steers (1973) acknowledged the importance of meeting expectations for employees to feel committed and remain in the organisation. More commonly referred to as the Theory of Met Expectations (TME), support for the importance of met expectations has been found in several studies. In a meta-analysis, Wanous, Poland, Premack and Davis (1992) found that met expectations (as opposed to unmet expectations) are related to higher job satisfaction, organisational commitment, intent to remain, job performance and job survival.

In terms of the expatriate assignment context, researchers still continue to debate the role that met expectations play in determining expatriate assignment outcomes due to the uniqueness of these situations (Harvey, et al, 2007). Relatively little research has been conducted investigating the role of met expectations in the context of expatriate assignments. Of the few that have, Black (1992) and Stroh, Gregersen and Black (1998) found that accurate expectations were related to higher levels of repatriation adjustment and job performance. More recently, Caliguiri et al (2001) explicitly investigated the role of met expectations with on-assignment expatriate outcomes, and found support for the importance of met expectations for cross-cultural adjustment. Although little research has been conducted in this area, available evidence suggests meetings expectations is important for positive expatriate assignment outcomes.

An alternative view of how information available to expatriates is processed and how it may affect expatriate assignment outcomes is based on the Expectation Disconfirmation Theory (EDT), which developed in marketing research. Introduced by Oliver (1977), EDT is based on the key construct of disconfirmation, which suggests that "individuals implicitly make summary comparative judgments apart from and as an input to feelings of satisfaction" (p. 461). As these judgments are made, experiences can be perceived as either exceeding pre-experience expectations or worse than expected. As a result, positive or negative disconfirmation will occur and higher or lower job satisfaction and intention to remain or leave will accompany the appropriate disconfirmation. When expectations are met, this is referred to as confirmation. According to Harvey, et al. (2007), expatriate's will have a desired expectation level (high), a predicted expectation level, a minimum tolerable level of expectation, and a worst imaginable level of expectation. The predicted expectation level is the job experience that the expatriate anticipates having on the job. In many instances, positions and organisations do not meet the expectations of expatriates, but this does not always result in turnover (e.g. Buckley, Fedor, Veres, Wiese, & Carraher, 1998; Buckley, et al., 2002). Harvey and colleagues propose a continuum whereby expatriates are willing to stay, even if the job experience does not meet their expectations, providing the experience does not fall below their minimum tolerable level.

Overall, the research literature supports the responses in the focus groups in study one, which proposes that organisations would do well to provide as much realistic and relevant information about the expatriate assignment as possible in order to minimise the negative effects of unmatched expectations with assignment experiences.

5.1.6 Networks and contacts. According to Baumeister and Leary (1995), humans have an underlying need to belong, which motivates the establishment of significant interpersonal relationships and frequent contacts with other human beings. Similarly, respondents in study one highlighted the importance of having networks and contacts both in the host country and with home.

5.1.6.1 In-country. When an employee is sent abroad on an expatriate assignment, their existing relationships and social networks are broken. Oberg (1960) noted that missing one's friends is one of the defining aspects of culture shock. Linehan (2000) found that given the absence of family and friends, the advantages offered from formal and informal social networking abroad are greater than the benefits of social networking domestically. Therefore, it can be important for expatriates to build up new social networks in the host country to help to reduce anxiety or uncertainty from the relocation (Caligiuri & Lazarova, 2002; Kuo & Tsai, 1986; Wang, 2002). Whilst contact with home networks is still possible, social interaction and contacts typically stems from the host country either through HCNs or other expatriates.

Toh and Denisi (2007) highlighted two important features of socialising with HCNs, including providing information, and offering social support. Expatriates need to learn what to expect, how to interpret various stimuli, and how to behave appropriately in their new role in the host country (Black & Mendenhall, 1990; Furnham & Bochner, 1983). The environment is unfamiliar, and informational resources these expatriates once relied upon in their home country are no longer present. HCNs are most likely to possess the requisite knowledge and have the necessary links to provide important informational resources. Host country supervisors, co-workers, and subordinates are possible sources of valuable role information (Peterson, Rodriguez, & Smith, 2000), knowledge, and feedback (Javidan, Brodbeck, & Wilderom, 2005). As organisational insiders, HCNs have more experience than the newcomer in the organisation, and thus, encounter fewer surprises in the course of work compared to the newcomer (Louis, 1980). The expatriate newcomer lacks these resources and as such, the resource network that HCNs can bring to expatriates is valuable to the expatriates' sense-making process (Feldman & Bolino, 1999; Toh & DeNisi, 2005).

As expatriates no longer reside in familiar social environments where their network of friendships is readily available, developing alternative sources of social support is important. Supportive relationships, including friendships that provide emotional reassurance, information, encouragement, or aid in dealing with stressful situations (Fisher, 1985; Javidan, et al., 2005) can help these newcomers deal with unexpected or unpleasant experiences (Nelson & Quick, 1999). According to Wills (1991), even if help is not needed, the mere knowledge that support is available is often sufficient to help alleviate newcomers' stress. Friendships with locals can help the expatriate overcome culture shock and any feelings of loneliness or isolation experienced through being away from their home and previous support networks (Osland, 1995; Toh & DeNisi, 2005). Torbiorn (1982) notes that expatriates who build a network of HCN relationships tend to experience higher satisfaction. More recently, research suggests that the presence of social support has a positive relationship with expatriate adjustment (e.g. Bhaskar-Shrinivas, et al., 2005; Black, et al., 1991). The friendships and mentoring provided by HCNs help alleviate the stresses faced by expatriates (Bell & Harrison, 1996;

Bjorkman & Schaap, 1994; Suutari & Brewster, 1998), providing perceptions of procedural justice are fair (Leonardelli & Toh, 2011) and the type of organisation permit higher levels of support (Stroppa & Spieß, 2010), can in turn differentiate between successful and unsuccessful expatriate assignments (Osland, 1995).

Liu and Shaffer (2005) proposed and investigated a model of social interactions and influences on expatriate adjustment and performance. In their social capital model of expatriate adjustment and performance, emphasis was given to the importance of the HCN. A number of key predictor variables were proposed, including the importance of HCN intercultural qualities (e.g. interpersonal skills, personal traits, and cultural empathy). The model, drawing on earlier models of social capital by Lin (2001a, 2001b) and Adler and Kwon (2002), found some support for predicting performance, but a relatively weak relationship with adjustment. Li, Wang, and Rothstein (2010) found that the closeness and size of an expatriate's social networks was positively related to the amount of cultural information and support the expatriate had, which in turn facilitaes expatriate adjustment, performance and job satisfaction. The importance of the HCN in affecting expatriate outcomes has also been proposed by Toh and Denisi's (2007) model of expatriate adjustment. Within the model, a social identity perspective was used to suggest that both expatriate qualities and HCN qualities influence expatriate adjustment (e.g. through outgroup categorisation and socialising behaviours). Both models build on, or relate to, Church's (1982) application of the contact hypothesis for interpersonal interactions between expatriates and HCNs. According to this hypothesis, more interaction (i.e. contact) with people from another cultural group results in more positive attitudes towards individuals from that group (Allport, 1954; Amir, 1969; Zajonc, 1968).

Whilst networking with HCNs has been acknowledged as beneficial for expatriates, it is not the only avenue for expatriates to develop such networks and contacts. Social interactions with other expatriates can create a sense of belonging for these employees as well as being another valuable source of information about the host environment (Adelman, 1988; Caligiuri, et al., 1999; Feldman & Bolino, 1999). Debates continue to exist between scholars regarding the advantages of "expatriate bubbles" (Ward, Okura, Kennedy, & Kojima, 1998, p. 281). Some argue that expatriates forge and maintain social relationships with other expatriates primarily from their home country (Scott, 2007); whereas others argue that social networks between expatriates are not necessarily dictated through nationality (Beaverstock, 2002). It has been suggested that "homophily" may play a role, whereby people who have similar social characteristics (e.g. age, gender, ethnicity, occupation, education and class) tend to have significant social contact with one another (Lazarsfeld & Merton, 1954; McPherson, Smith-Lovin, & Cook, 2001).

Black (1990) found that social support from both HCNs and home country nationals had a positive effect on expatriate adjustment. Similarly, Wang and Kaningo (2004) examined the impact of expatriate network characteristics (size, cultural diversity, localization, closeness and frequency) on an expatriate sample from the US, Europe and Asia in China. They found network characteristics had a direct and significant effect on expatriate well-being. Wang and Nayir (2006) found that social interaction had a positive influence on expatriate adjustment and well-being. On the basis of these empirical findings, it appears that networks and contacts may be important in the success of expatriate assignments. Overall, this aspect of expatriation remains under-researched (Harvey, 2008b) and more research is required on the decision processes behind expatriate social networks. However, so far the literature supports the importance of contacts in-country as raised in study one.

5.1.6.2 Contact with home. Contact with existing social networks from back home is still possible for the expatriate. For example, communication technologies such as e-mail, telephone or the internet can be used to maintain relationships with family, friends and the home organisation. Wellman and Wortley (1990) have argued that this type of social interaction is usually not very helpful due to long distances. However, Cateora and Graham (2005), proposed that expatriate assignment failure can sometimes be traced back to a lack of communication. Communication between the parent organisation/head quarters and the expatriate can be a valuable means of maintaining high levels of expatriate motivation (Avril & Magnini, 2007). Acting as a form of procedural justice (Palmer, Beggs, & Keown-McMullan, 2000), perceptions of corporate justice via communication influence employee's motivation. Without sufficient communication through this channel, an "information gap" can result and expatriates can be left with the feeling of being "out of sight, out of mind" (Hiltrop & Janssens, 1990, p. 23). This may result in lowered productivity and satisfaction. As such, academics have recommended an "umbilical cord" or "godfather" approach to assignments. This entails having a strong and frequent line of direct communication between the parent organisation and the expatriate (Noer, 1974). Specific research examining the effects of contact with members of the family or friends back at home has yet to be conducted. Nevertheless, the results from study one of this research suggest that these are important areas of expatriate assignments and worthy of consideration by the organisation.

5.1.7 Culture. When employees are sent on expatriate assignments, adjusting to the new cultural context is a daily challenge (Early, 1994; Newman & Nollen, 1996). This is an issue that has been addressed in the research literature on sojourner adjustment (Brien & David, 1971; Church, 1982; Furnham, 1988) and expatriate manager research (Black, et al., 1991; Mendenhall & Oddou, 1985; Torbiorn, 1982). The differences in cultures expatriates (and the accompanying family) face are one of the primary contributory factors for culture shock (Furnham & Bochner, 1983), which can influence outcomes of businesses (Gilbert & Tsao, 2000). However, it is generally agreed that not all assignments are equal and some countries and cultures may be more difficult to adapt to than others. This may be due to the degree of cultural differences that individuals are faced with, and is referred to as cultural distance (CD), "cultural novelty", "culture toughness", or "culture barriers" (Kupta, Everett, & Cathro, 2008, p. 1769). Typically taken at a national level, it is widely assumed that the bigger the CD the more difficult it will be to adjust and the more effort is required to adapt (e.g. Mohr & Klein, 2004). The perceived national CD has also been found to impact negatively on expatriate job satisfaction (Froesea & Peltokorpib, 2011). As a result, organisations frequently assume some assignment locations are more difficult than others, labelling them as "tough assignments" or "hardship postings" (Selmer, 2007, p. 186).

Cultural differences at work have a long history, with writings dating back to the Persian Empire (circa 400BC) (De Sélincourt & Marincola, 2003). This long standing history has resulted in many conceptions and definitions of culture. By 1952, 164 different definitions of culture were cited by Kroeber and Kluckhohn (Selmer, 2007). This was before cross-cultural theory and research had gained popularity within the area of organisational behaviour (Gelfand, Erez, & Aycan, 2007). Culture has been defined in a number of ways, including as the human-made part of the environment, a shared meaning system, an unstated standard operating procedures or ways of doing things, and as patterned ways of thinking (see Gelfand, et al., 2000 for a review of some definitions). Classifications have also been developed for grouping countries and their culture. One of the most frequently adopted classification systems is the influential model by Hofstede (see Hofstede, 1980), which posits that all cultures could be classified as a function of four indices: (1) power distance; (2) individualism–collectivism; (3) masculinity–femininity; and (4) uncertainty avoidance.

Power distance is the extent to which employees in a less powerful position accept that power is unequally distributed. People from countries with a high power distance obey the order of their superiors. Research has shown that organisations in lower power distance countries (e.g. Japan) will be more decentralised and have a flatter organisational structure (Hodgetts & Luthans, 2000). Individualism is associated with the tendency of individuals to think primarily about and act in a manner that is preferential to themselves and their immediate family. Countries such as the USA, Canada, Australia, Denmark and Sweden are all associated with high in individualism. According to Hodgetts and Luthans (2000), countries with higher individualism tend to place greater value in the so-called "Protestant work ethic" and greater individual initiative. Countries such as Pakistan and many South American countries are associated with lower levels of individualism (i.e. a more collectivist approach). Individuals from countries higher in collectivism often perform actions for the mutual benefit of the group, not just themselves.

The index of masculinity refers to the extent to which the dominant societal values lie in success, money and possessions. Japan is a country that is high in masculinity, and members of this culture typically emphasise recognition, advancement, earnings, and challenge. Individuals in countries with a lower masculinity index (e.g. Norway) usually place greater importance on a friendly atmosphere, cooperation, and employment security (Hofstede, 1994). Uncertainty avoidance refers to the extent to which individuals feel threatened in ambiguous situations and as a result, have created beliefs and institutions in an attempt to avoid them. Hofstede (1980, 1994) stated that individuals from countries such as Spain, Germany and Japan typically possess a higher need for security, whereas countries such as the USA, Denmark and Great Britain are more willing to take risks (Hodgetts & Luthans 2000). Such dispositions classify these countries within high and low uncertainty avoidance, respectively.

Alternative classificatory models have also been proposed since Hofstede. For example, Bond and colleagues (1987) identified the Confucian dynamic, consisting of a two pole continuum of culture. Those cultures with higher values of the Confucian dynamic represent values of persistence, thrift, loyalty and a future orientation. Individuals from Asian countries (e.g. Korea, Japan, China and Taiwan) are suggested as possessing high Confucian dynamic values (Lee & Li, 2008). Lower values of Confucian dynamic however, are associated with respecting tradition and social hierarchy, personal honour and face. Another more recent classification is Lewis' (1999) Linear-Active-Multi-Active Scale (LAMAS) and Dialogue-Oriented-Data-Oriented Scale (DODOS). On the former scale, cultures within linear-active time systems (e.g. Sweden, Switzerland, Holland or Germany) are said to have action patterns that are sequential, focused on single acts, time conscious, and punctual. Within the multi-active time systems (e.g.

Mediterranean and Latin American cultures), these cultures have a tendency to be more flexible, engage in several activities simultaneously, and have less rigid conversation management rules. Regarding the distinction between dialogue-orientation and data-orientation among national cultures, individuals of dialog-oriented cultures are said to have closer social networks, and have "a natural tendency to listen well and enter into sympathetic dialog" (p. 48). This enables them to gather information about their communicative partners and the context via more informal channels. This description includes Latin Americans, Mediterraneans and Arabs. Germans, Swiss, North Americans and New Zealanders however, are said to be members of data-oriented cultures, which in contrast "love to gather solid information and move steadily forward from this database" (p. 46). Kupta and Cuthro (2007) claimed that Lewis' culture classification is just as relevant as Hofstede's system, and may actually be slightly easier to use within the field of international human resource management (IHRM), or related fields.

According to Haslberger (2005), CD has inherent problems in relation to the choice of analysis level and how culture is operationalised. As highlighted above, many definitions of culture exist, and culture can actually operate at multiple levels (Gelfand, et al., 2007). For example, Hofstede's (1980) classifications is the most comprehensive available measure (Shin, Morgeson, & Campion, 2007), but legitimate concerns about it have been raised. These concerns include an inadequate range of nations being sampled, issues concerning generalisability, validity, historical changes, and a lower than satisfactory level of comprehensiveness (Schwartz, 1994; Spector, Cooper, & Sparks, 2001). Mohr and Klein (2004) stated that CD cannot be adequately measured quantitatively as suggested by Hofstede (1980), as CD does not exist independently from the individuals involved. They propose that CD actually reflects the extent to which individuals perceive their own norms and values to be different from those dominant in the host country.

The assumption that adjustment will be more difficult in more different host cultures has also come under scrutiny recently. Selmer et al. (2007) argued that although this assumption is intuitively plausible and supported by anecdotal evidence, an opposite position has been presented in the literature. This position proposes that expatriates may find similar cultures just as difficult to adjust to as dissimilar cultures (e.g. Brewster, 1995; Selmer, 2007). Sometimes referred to as the cultural distance or psychic distance paradox (O'Grady & Lane, 1996), expatriates who expect only relatively minor cultural differences but discover that some cultural adjustment is actually required, may find this require greater adjustment than if the expatriate had expected a highly different CD. In a study of 36 UK-based organisations, Forster (1997) found that expatriates were as likely to report adjustment problems from those in supposedly similar cultures (e.g. US) to those in supposedly dissimilar cultures (e.g. China). Forster concluded that the degree of cultural "strangeness" of the host country did not seem to be correlated with outcomes of the assignment. Peterson et al. (1996) also found that expatriates from Japanese MNCs had "about the same" level of adjustment, regardless of host country cultural similarity to Japan. Selmer (2007) also found tentative quantitative support for the proposition that regardless of CD, adjustment was no different whether expatriates from the US moved to Canada (presumed low CD) or Germany (presumed higher CD).

The assumption that there is symmetry between CD and adjustment regardless of the direction of the move has also been called into question. For example, whether a UK expatriate is moving to Japan or a Japanese expatriate is moving to the UK, because the CD is the same, adjustment required and experienced should be equal in both directions. However, no empirical evidence supports this assumption (Selmer, et al., 2007; Shenkar, 2001). In fact, Shenkar (2001) suggested that logic and empirical findings suggest the opposite. Brewster, Lundmark and Holden (1993, cited in Selmer, Chiu, & Shenkar, 2007) suggested that it may be easier for an individual from a low authoritarian culture to adjust to a more authoritarian culture than the other way around. Further, cultural dissimilarities may even be complementary, which is something that Hofstede (1989) had later noted himself. Selmer et al. (2007) investigated the symmetry of adjustment with CD and found tentative evidence that an asymmetry may exist. According to Shenkar (2001), this occurs because both home and host cultures vary within their situations in cultural space and because it is the individuals who are required to adjust to the environment, not the converse.

Results of study one revealed that perceiving cultural differences and having an awareness of difference is important for expatriates to be successful. Similarly, Selmer et al. (2007) put forward Lewin's (1951) model of the change process and the theory of selective perception as important theoretical underpinnings for the importance and influence of CD on adjustment. Lewin's (1951) three-stage model of change comprises of an "unfreezing" stage, a "changing" stage, and then a "re-freezing" stage. For unfreezing to occur, the individual must be motivated to change and present attitudes or behaviours must fail or be disconfirmed. This disconfirmation must then result in a sufficient level of anxiety in order to motivate the change, but the individual must feel psychologically safe for change to happen (Schein, 1980). In accordance with this theory, it has been suggested that it could be more difficult to unfreeze when there appears no need to do so. In other words, motivation is not present in the individual. Many similarities between the home and host culture could mask true differences and prevent initial unfreezing from taking place. Perceiving and acknowledging the importance of differences, regardless of size, is therefore important for change to occur within an individual.

According to the theory of selective attention, when individuals are faced with new situations, simple mental representations are constructed in order to derive form and meaning to the environment in an attempt to avoid being overwhelmed by the amount of novel information. These mental representations have been given various labels, including cognitive maps, schemas, scripts, and belief structures (Fiske & Taylor, 1984). Festinger's (1957) Cognitive Dissonance Theory states that individuals favour information that is consistent with their own beliefs, behaviours and attitudes, so that people have a bias for gathering data that is positively reinforcing (Fiske & Taylor, 1984). As a result, expatriates may not perceive cultural differences in a host culture because they do not expect any. Consequently, problems that arise could instead be attributed to their own incompetence or perceiving host country subordinates as being stupid or lazy (Selmer & Shiu, 1999) instead of cultural differences. Therefore, perceiving cultural differences is important not only for adjustment, but for preventing misunderstandings or inaccurate attributions of blame, which could negatively impact on the expatriate assignments.

Overall, the concept of culture, although of central importance, remains difficult to define and inadequately operationalised. Long-standing assumptions about culture and its influence on individuals and expatriate assignment outcomes are also being challenged, suggesting that much more research is needed in this area in the future.

5.1.8 After assignment. Once the expatriate assignment within the host country has drawn to an end, the employee (and his or her family) must return to the home country. This process, known as "repatriation" reflects the final stage of the assignment and an area that is being increasingly recognised as a part of the process that is difficult to manage and make successful (Lazarova & Cerdin, 2007).The issues of repatriation and employees choosing not to return home were important findings in study one and are discussed in the following sections.

5.1.8.1 Repatriation. The process of returning to live in the home country can be a very challenging and difficult experience. Individuals (and families, Harvey, 1982, 1989) are said to experience a "reverse culture shock" (Goss & Hynes, 2005; Vidal, Valle, & Aragon, 2007a), which is considered to be more severe than experienced during the expatriation phase (Furuya, Stevens, Oddou, Bird, & Mendenhall, 2007; Hyder & Lövblad, 2007). Just as expatriates have to adjust to the new host country, repatriates must adjust back to their home country after being away. A frequent experience or complaint from expatriate employees when they return to work in their home country is that they feel unappreciated and may not be in a position where they can apply their new skills or knowledge. This situation has been referred to as "underemployment" (Kraimer, et al., 2009). Expatriates can also be faced with a lack of interest and sometimes resentment from their domestic peers, and may feel that the new knowledge they attempt to contribute is discounted or ignored (Berthoin Antal, 2001). These difficult experiences leave many repatriates reporting disappointment with their repatriation experience (Linehan & Scullion, 2002; Paik, Segaud, & Malinowski, 2002; Suutari & Brewster, 2003).

High turnover of expatriates have been noted as a critical concern for organisations engaging in these international strategies (Stevens, Oddou, Furuya, Bird, & Mendenhall, 2006). When repatriates leaves, the organisation loses their knowledge and newly developed skills, often to a competitor (Caligiuri & Lazarova, 2001; Jana, 2000; Lazarova & Tarique, 2005; Poe, 2000). High turnover rates among repatriates also have the potential to reduce the probability of new high calibre employees volunteering for such international assignments (Tung, 1988). Lazarova and Cerdin (2007) labelled this group of formerly expatriated employees as "the frustrated repatriate". They believed that more top-down and organisational support interventions were necessary to improve the success of repatriation.

Recently researchers have begun to acknowledge the possibility that the individual and environmental factors play a significant role in the cause of repatriate turnover. Lazarova and Cerdin (2007) referred to this position as the "proactive repatriate". This perspective suggests that employees' initiative and career goals are most important than organisational decisions and actions. International experience is a tradable asset that repatriates can use to advance their careers, either with the home organisation or elsewhere (Tung, 1998). Decisions to leave the organisation may reflect poor organisational efforts to reintegrate the employee, but it may also be driven by the pursuit of external job opportunities that are more in line with the employee's own career objectives. This recent perspective draws on the "boundaryless career" (careers involving physical mobility across various organisations, Arthur & Rousseau, 1996) and the "protean career" (self-directed and value-driven careers, Hall, 1996). It places greater emphasis on the individual and their rational choice to seek a better career fit (Leiba-O'Sullivan, 2002), as opposed to attrition being entirely due to frustrations that are attributable to the home organisation. Lazarova and Cerdin (2007) investigated both the traditional and more recent positions for repatriate turnover and found that both sets of factors appear to be important, although individual level factors may be stronger predictors.

It is important to note that very little empirical research has been conducted on the repatriation process relative to the earlier stages of expatriation (Kraimer, et al., 2009; Szkudlarek, 2010). Most research has presented a picture of dissatisfaction with the experience of returning back to work for the home organisation. Training, career support, improved communication, and mentoring have all been suggested as potential organisational interventions to reduce the exodus of repatriates (Lazarova & Cerdin, 2007). The repatriated British employees from study one described how important repatriation issues are to consider as they can result in negative outcomes if not managed appropriately.

5.1.8.2 Non-returns. Expatriates and repatriates are regarded as "the most precious resource of all" (Inkson, et al., 1997, p. 355). The expatriate acquires new knowledge and skills through their international experience, which is a valuable commodity. The "global mindset" (Vidal, Valle, & Aragon, 2007b, p. 1274) developed by the expatriate employee is advantageous in many general ways, but specifically for the organisation in terms of the strategy and organisational development. Information about other subsidiaries, cultures and organisations can aid the home organisation in achieving their organisational goals. Therefore, these employees play a key role in establishing and maintaining a competitive advantage over competitors (Nohria & Ghoshal, 1997). The high costs associated with expatriate assignments and the potential important long-term benefits make retaining repatriates an important issue (Goss & Hynes, 2005). This view of repatriates as tools of knowledge transfer is in line with recent discussions highlighting the importance of "reverse diffusion" (Edwards & Ferner, 2004). If knowledge is not passed on, it represents an indirect lost cost to the organisation. This cost most obviously occurs if the employee decides not to return and so cannot transfer information to the home organisation.

The phenomenon in which highly skilled individuals decide not to return to their home country after studying or working in a foreign country is referred to as a brain drain (Baruch, Budhwar, & Khatri, 2007). Carr, Inkson and Thorn (2005) alternatively referred to this occurrence as a "talent flow", where valuable individuals remain outside of their home country. Like repatriation, relatively little research has been conducted on this situation and as a result, little is known about the reasons behind decisions to stay. According to Baruch (1995), the "push-pull" model by Lewin (1995) has clear relevance for cross-border movements. Baruch suggested that various individual, organisational, and national level factors can explain the nature and direction of the push and pull forces. A host of factors, including economic, social, or legal, may influence an individual's decision to stay abroad. In many cases however, it is the individual choice that influences the final decision. Baruch, et al. (2007) investigated factors that influence the decisions to remain abroad were investigated on a student sample. The results suggested that perceptions of ethnic differences and the labour market, their adjustment process in the host country, and family ties within both host and home countries influenced intentions to remain in the host country. From the results of study one, not returning to the UK was considered an important outcome for organisations to consider with various factors suggested for why employees may choose to remain in the host country. These included some of the push-pull factors mentioned above (e.g. family, lifestyle, etc.). However, more research is needed to explore these factors in expatriate employee samples.

5.1.9 Adjustment. Research on expatriate adjustment has been conducted for over forty years and various terms and models used in the research literature. For example, the terms culture shock, acculturation, adaptation and adjustment have been used interchangeably. Initial interest in adjustment stemmed from a piece of research by Lysgaard (1955) who explored the adjustment of Norwegian students that had received Fullbright scholarships to study in the US. Lysgaard noted that students who experienced the greatest adjustment difficulties were those that had resided abroad for 6-12 months compared to those who had been studying overseas for less than 6 months or more than 18 months. At this time, adjustment was conceived as a very broad and unitary concept and the process of adjustment had a curvilinear pattern. Initially, the expatriate experiences elation and optimism when first exposed to the new culture. However, the expatriate will also have trouble in communicating and functioning (Guy & Patton, 1996), which in turn will produce varying degrees of negative feelings. Over time, the expatriate was believed to acquire more experience of the culture and thus attain mastery of it. At this level, the expatriate experiences higher levels of self-confidence, functionality, and in turn adjustment (Guy & Patton, 1996).

Like Lysgaard (1955), many researchers have since applied a temporal sequence perspective (Guy & Patton, 1996) to the process of expatriate adjustment. For example, Oberg (1960) believed that individuals typically move through stages of culture shock before reaching a satisfactory level of adjustment. Oberg coined the term "culture shock", which proceeded to add specificity to the unitary adjustment concept. Oberg stated that culture shock is an "occupational disease of people who have been suddenly transplanted abroad [and is] precipitated by the anxiety that results from losing all our familiar signs and symbols of social intercourse" (Oberg, 1960, p. 177). Culture shock was thought to be the natural outcome of trying to adapt to a new culture, including its language, norms and customs. Such shock would usually invoke symptoms such as irritability, anxiety and psychological discomfort (Black, 1990).

The temporal process of adjustment or culture shock is proposed to comprise of four stages, which can be graphically represented by a U-shaped curve (see figure 5.1) and is referred to as the U-Curve Theory of Adjustment (UCT) (Gullahorn & Gullahorn, 1962). The first stage is known as the Honeymoon Stage, and describes the initial elation experienced by expatriates when they first move to the host country. The duration for this stage is believed to be no more than two months (Black & Gregersen, 1991; Gullahorn & Gullahorn, 1962). The second stage is the Disillusionment Stage, and is what is commonly referred to as the Culture Shock Stage. This stage occurs when the expatriate starts to cope more seriously with the new culture they find themselves living in on a daily basis and realise they have an insufficient understanding of the new culture. Previously learned behaviours are now inappropriate in the new host culture and they have not yet learned the "appropriate" substitute behaviours (Torbiorn, 1982). This stage of the adjustment process typically results in feelings of frustration, confusion and depression (Ward, et al., 1998). The third stage is commonly known as the Adaptation stage, which is characterised by an increased ability to fit in with the new culture and environment (i.e. adjustment). The final stage of the adjustment process is the Mastery Stage, whereby adjustment is as complete as it could ever be and any anxiety previously experienced has now largely disappeared (Eschbach, Parker, & Stoeberl, 2001). This perspective of adjustment and culture shock has received much attention and been one of the most consistently cited theories within this area of research (Eschbach, et al., 2001).

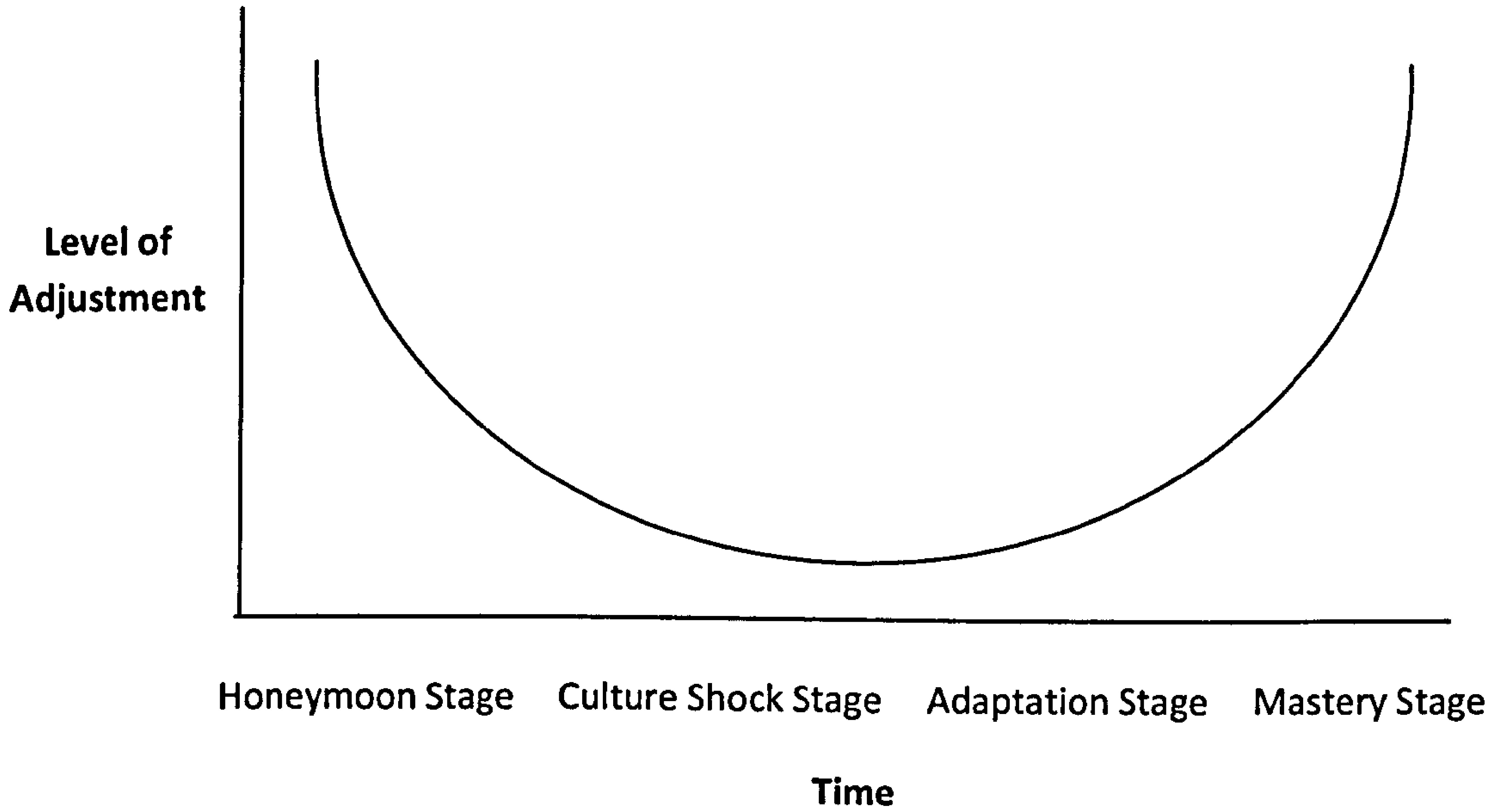

Figure 5.1 The U-curve theory and proposed stages of adjustment

However, until the early 1990s, cross-cultural adjustment was regarded as a uni-dimensional construct. Initially, Black (1988) suggested that cross-cultural adjustment should actually be treated as a multidimensional concept. Black and Gregersen (1991) then proposed a model of adjustment whereby adjustment was split between anticipatory adjustment (prior to move) and in-country adjustment. The latter form of adjustment within the host country was proposed to comprise of three dimensions: work adjustment; interaction adjustment; and general adjustment (e.g. Black & Stephens, 1989; Gregersen & Black, 1990). The first dimension was adjustment to the job and it was thought that aspects of the corporate culture in the host country operations could often be radically different from those back in the expatriate's home country, thus placing significant strain on the expatriate's ability to adjust to their tasks and responsibilities. A second dimension was adjusting to interact with HCNs. It was believed that regardless of country of origin, adjusting to HCNs was the most difficult of the three dimensions. One reason for this may be due to the differences in mental maps and rules between the expatriate and the HCNs developed from each country's unique influences (Black & Gregersen, 2000). These researchers believed that adjustment entailed creating a new set of mental road maps and book of traffic rules. These mental maps and rules permit expatriates to predict what behaviours are expected in certain situations, how people will respond, and what the inappropriate behaviours are in the host country. The final dimension of adjustment relates to the general non-work environment and includes issues relating to country differences in transportation, healthcare, food, and entertainment. This advanced multidimensional perspective of adjustment was a popular approach and is still used in research today.

The multidimensional approach to adjustment was also adopted by a separate branch of researchers, who differentiated between two types of adjustment that were associated with an expatriate's level of acculturation. These two types were referred to as psychological adjustment and sociocultural adjustment (Ward, et al., 1998). The former is associated with mood states and subjective well-being (e.g. tension, depression and anxiety) and is based on a problem-orientated view, focusing on attitudinal factors of the adjustment process (Grove & Torbiorn, 1985; Juffer, 1986; Oberg, 1960). Sociocultural adjustment is associated with the ability to fit in with the host culture (Ward & Kennedy, 1996) and is based on cultural learning theory, highlighting the social behaviour and practical social skills underlying these attitudinal factors (Black & Mendenhall, 1991; Furnham, 1993; Klineberg, 1982). The functioning and emotions of each stage are believed to be conceptually related so that each form of adjustment is in some way related to the other (Swagler & Jome, 2005). However, whilst they are theoretically interrelated, these two concepts are believed to be sufficiently distinct from one another to warrant separation (e.g. Searle & Ward, 1990b; Ward & Kennedy, 1992; Ward & Searle, 1991). For example, each type of adjustment has different effects at different times across the expatriate's level of acculturation, as well as having different predictors (Berry, 1997).

A model of expatriate acculturation has been proposed by Aycan (1997) in an attempt to predict expatriate performance and adjustment. The process of acculturation is believed to produce a number of cognitive, affective and behavioural changes within the expatriate due to their first-hand exposure with a whole new cultural context (Redfield, Linton and Herskovits, 1936, cited in Aycan, 1997). The model of expatriate acculturation proposes that acculturation also takes place in four distinct phases, with phase one concerned with the "Pre-Departure Preparation" by the parent company, the expatriate, and the local unit. Phase two is characterised by the "Post-Arrival Initial Contact" between the expatriate and the new socio-cultural environment (the local unit) of the host country. After this initial contact phase, the expatriate then experiences conflicts, problems, uncertainties, acceptance by local nationals, and are identified and appraised as either stressful events or potential opportunities for personal and professional development. After this appraisal, the expatriate then attempts to cope with the situation using coping strategies and practices. Aycan (1997) labels this phase the "Appraisal and Coping" phase, which results is the fourth phase in the Acculturation Process called the "Psychological and Adjustment Outcomes". These include both positive and negative psychological outcomes, such as feelings of stress and alienation, and/or general and work-related adjustment.

In terms of empirical research, adjustment has typically been regarded as a measure of expatriate assignment success. Takeuchi, Yun and Russel (2002) argue that expatriate adjustment is more accurately conceived as a key mediator that leads to success or failure of an expatriate assignment, and not an expatriate assignment outcome. This is said to be because adjustment is a process that occurs within the expatriate assignment (Ones & Viswesvaran, 1997). Expatriate adjustment has received a lot of attention and research, but typically as an outcome of an expatriate assignment, not a predictor. However, the importance of considering this construct within expatriate assignments is supported in the literature.

5.2 Conceptualising Expatriate Assignment Success

Throughout the history of expatriate assignment research, defining the term expatriate assignment success has proven difficult. Several attempts have been made by many authors to define the concept, but no universally accepted definition exits. Arthur and Bennett (1995) noted that in more than five decades of research, there is yet to be an unambiguous and overt knowledge structure of what exactly it is that researchers and practitioners should be regarding as success. The problem of finding a clear "index of a worker's success" (i.e. the criterion, Cook, 2004, p. 10) has been an issue of debate for many decades. According to Ones and Viswesvaran (1997), "the problem of the criterion has been almost more retarding an issue in the expatriate literature [...] than it has been in most domestic (within culture) studies in industrial/organisational psychology" (p. 75). Clarity on how expatriate success can be defined and measured is required, as ambiguity makes it difficult to compare and integrate research findings and theoretical discussions (Mol, Born, & van der Molen, 2005). Moreover, it makes reducing the gap between research and practice more difficult, if not impossible. Within the literature, three main expatriate assignment success conceptualisations have been used: (1) adjustment; (2) performance; (3) completion of assignment.

5.2.1 Expatriate adjustment. Expatriate adjustment is the most common conceptualisation of expatriate assignment success and as a result has received the most attention by researchers (Shaffer, et al., 1999). This section focuses on the discussion surrounding the adequacy of conceptualising expatriate assignment success as successful adjustment of the expatriate.

Although expatriate adjustment has been a popular conceptualisation, various concerns have been highlighted with the attempts to use adjustment as an expatriate assignment success criterion. For example, there still remain some fundamental shortcomings and knowledge gaps in the area. One of these is the fact that there has never been a definition of expatriate adjustment agreed upon by a majority of researchers (Black & Mendenhall, 1991; Searle & Ward, 1990a). The effect of this is evident by the interchangeable use of numerous related terms. However, these terms refer to different things and distinctions can be found in the literature regarding their differences. For example, the terms adjustment and adaptation have been used interchangeably to signify various outcomes from an expatriate assignment, including feelings of satisfaction and acceptance (Brislin, 1981), the nature and extent to which an expatriate interacts with HCN (Sewell & Davidsen, 1961), the attainment of acceptable skills and behaviours in the new culture (Bochner, McLeod, & Lin, 1977), and an absence of mental health problems such as depression or stress (Berry & Kim, 1988).

A conceptual distinction between adaptation and adjustment should also be drawn. At some stage in acculturation, an individual may choose to adapt to their new environment by exploiting several strategies, including "reaction" to changes or "withdrawal" from the society (Berry, 1992). Amongst other adaptation strategies, adjustment indicates changes in the expatriate in a direction that has reduced conflict and increased congruence between the individual and the new environment (Berry, 1992). Adjustment has been suggested as being a better term to use for expatriates because they undertake a process of change in order to "fit into" the host country society, in which their stay is temporary (Aycan, 1997). However, adaptation is proposed to be more appropriate for the acculturation process in multicultural societies where the immigrant's stay is permanent (Aycan & Berry, 1996; Berry, 1992; Searle & Ward, 1990a).

Questions have also been raised regarding the assumption that adjustment develops over time in stages, as suggested by the UCT of adjustment. These questions stem as far back as Church (1982), who questioned the original claim that the U-curved adaptation process "refers to a genuine time process that every grantee must be assumed to have passed through" (Lysgaard, 1955, p. 49). Various adjustment studies have revealed other temporal relationships and curves that resemble other wave-forms, including a side-ways S pattern (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2004), a J-curve and a wave-like curve (see Black & Mendenhall's 1991 review). However, there are some methodological concerns with adjustment studies that raise questions about expatriate adjustment and how it is conceived. For example, a review of the literature on adjustment and the UCT by Black and Mendenhall (1991) brought to light some interesting points regarding the adequacy of the research. For example, almost all of the studies (10 out of 12 in this review) offered no statistical tests of the data (i.e. they only report percentages, means, etc). In addition, there are very few longitudinal studies on UCT, despite the UCT being a description of adjustment over time. These adjustment studies frequently provide no indication of how much time had passed between the time of the study and the point of time when participants were asked to recall their level of adjustment. This opens up the potential for concerns over the accuracy of participant recollections. Hence, problems exist for these studies in generalising their results due to a lack of methodological rigor. Yet, whatever the shape of the model, theories still assume that every individual goes through the same experiences, for the same lengths of time and in the same order. Research does not support this assumption; not all individuals experience the same degree of culture shock or pattern of adjustment (Black, 1990a).

Turning to the appropriateness of using adjustment as an outcome measure of expatriate assignment success, Ones and Viswesvaran (1997) argue that adjustment cannot indicate expatriate assignment success because it is not an outcome itself, but a process that occurs within the expatriate assignment. Expatriate adjustment is more accurately conceived as a key mediator that leads to success or failure of an expatriate assignment, not an outcome (Takeuchi, Yun, & Russell, 2002). The lack of consensus in defining and understanding expatriate adjustment also poses problems for operationalising the construct. For example, the various definitions and conceptualisations of adjustment have resulted in researchers and practitioners adopting various measurement approaches and scales to measure adjustment. Some researchers have used the General Well-Being Questionnaire to measure expatriate's level of adjustment (e.g. Selmer, 1999b), whereas others have used specific adjustment scales, which also vary in the structure and number of items deemed necessary to measure adjustment. Black (1990) developed and used a multidimensional scale for adjustment containing 14 items, whereas Caliguiri (1997) developed a single scale for adjustment comprising only of four items. These differences add to questions over the reliability and appropriateness of using expatriate adjustment as the criterion of expatriate assignment success. However, adjustment continues to be an outcome variable of interest to researchers and one that should continue to be included in expatriation research.

5.2.2 Expatriate performance. The conceptualisation of expatriate assignment success shifted during the early 2000s as popularity of expatriate adjustment gave way to the growing trend of conceptualising expatriate assignment success in terms of expatriate performance (Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006). There have been several attempts to identify the underlying structure and dimensional composition of expatriate job performance. Some researchers believe that domestic job performance models can be applied to an expatriate assignment, whereas others believe that the expatriation situation is substantially different and requires more specificity.

Advocates for the use of domestic job performance models to assess expatriate job performance (e.g. Borman & Brush, 1993; Borman & Motowidlo, 1993) argue that such models are applicable to the context of expatriate assignments because they have been developed with the intention of application across jobs, settings, and industries (Ones & Viswesvaran, 1997; Sinangil & Ones, 2001). These advocates have proposed the application of popular domestic models of job performance such as those by Campbell and colleagues (Campbell, 1990; Campbell, McHenry, & Wise, 1990), and Viswesvaran and colleagues (Viswesvaran & Ones, 2000; Viswesvaran, Ones, & Schmidt, 1996). It is believed that although the taxonomy and overall model structure remain the same, the critical incidents for the dimensions should be focused on the expatriates and anchored for the specific job. For example, Ones and Viswesvaran (1997) adapted the domestic job performance dimensions in order to be applicable to expatriates specifically, which include job knowledge, quality, effort and initiative, communication competence, administrative competence, compliance with/ acceptance of authority, productivity, interpersonal relations, and leadership.

However, Sinangil and Ones (2001) pointed out that "perhaps the most important element that distinguishes expatriate jobs from other high complexity and high responsibility jobs is an added element of complexity by the intercultural environment in which these jobs are performed" (p.425). The generalisation of domestic models could potentially be too non-specific to encompass effectively the expatriate job performance domain. This view is supported in several early approaches to expatriate job performance, proposing varying numbers of specific expatriate job performance dimensions. For example, Cleveland et al. (1960) presented five specific factors for effective performance overseas, including technical skill, organisation skills, cultural empathy, belief in mission, and a sense of politics.

Hough and Dunnette (1992, cited in Sinangil & Ones, 2001) used mixed methods to investigate expatriate performance and develop specific behavioural dimensions to represent the criterion. Methods of investigation included structured interviews, experiential data, and various forms of sorting by experts in order to identify critical incidents of effective and ineffective behaviours related to living abroad and job performance. This research identified eleven specific factors, including: (1) knowledge of foreign language, (2) adjustment to living abroad, (3) adjustment to foreign business practice, (4) establishing and maintaining business contacts, (5) company support, (6) spouse and family support, (7) working with others, (8) communicating/persuading, (9) initiative/effort, (10) technical competence, and (11) accepting foreign assignments. More recently, such behaviourally specific criteria were proposed to be essential to the satisfactory assessment of expatriate job performance. Mol, Born and van der Molen (2005) proposed further specificity to expatriate assignment performance, suggesting the importance of including a construct of adaptive performance.

According to Sinangil and Ones (2001), a number of dimensions of expatriate performance are missing from Hough and Dunnette's model that potentially could hold across domestic and expatriate job situations. To address this, Sinangil and Ones (2001) developed a '"working model" of expatriate job performance, which combined both domestic job performance elements and expatriate specific job performance elements. The model drew on the proposed dimensions from the work of Campbell et al. (1996), Hough and Dunnette (1992), Ones and Viswesvaran (1997), Viswesvaran and Ones (2000), and Viswesvaran et al. (1996). Ten dimensions were proposed, including establishing and maintaining business contacts, technical performance, productivity, working with others, communicating and persuading, effort and initiative, personal discipline, interpersonal relations, management and supervision, and overall job performance (a composite of all the other nine dimensions in the working model). The benefit of such a hybrid approach is that is takes advantage of domestic job performance dimensions that are applicable but adds further specificity where relevant, overcoming the restrictive limitations of a purely domestic model.

The collaborative perspective of combining domestic job performance elements with more specific expatriate job elements has been adopted by other researchers to develop other multidimensional models of expatriate job performance. Caliguiri (1997) combined a domestic perspective of job performance with a tailored and more specific expatriation element to conceptualise expatriate job performance. Caliguiri's multidimensional model included task and contextual performance dimensions, which are conceptions of job performance frequently endorsed in domestic job performance literature and research (see Viswesvaran & Ones, 2000 for a review) as well as in practice. Technical performance refers to the tasks or duties incumbents perform on the job (Borman & Motowidlo, 1993). The contextual performance dimension refers to those aspects of the job performance that are not directly related to the technical tasks or duties of the job, but still contribute to the effectiveness of the organisation (Borman & Motowidlo, 1993). Similar to Sinangil and Ones's (2001) perspective, this domestic job performance perspective is generalised to the more specific expatriate job performance context. To incorporate further the added specificity of the expatriation context, Caliguiri included an expatriate-specific performance dimension, which referred to aspects of the job that do not necessarily occur domestically. Overall, Caliguiri's approach to expatriate job performance has been adopted by other expatriation researchers who have presented support for the reliability of the dimensions (see e.g. Shaffer, et al., 2006; Shay & Baack, 2006).

As organisations are concerned with employees' performance, conceptualising expatriate success in terms of assignment job performance can be argued as a logical and relevant choice of criterion (Cook, 2004). When the drawbacks of using expatriate adjustment became more apparent and widely accepted in the research literature, the argument for using this conception as the criterion of expatriate assignment success was strengthened. However, problems with this criterion echo those widely acknowledged in the domestic job performance literature. For example, no universally agreed understanding of the criterion job performance currently exists. Domestic job performance conceptualisations vary from single unitary dimensions to multi-dimensional constructs. Likewise, numerous models of expatriate job performance are proposed in the literature that encompass varying dimensional structures, ranging from four dimensions (e.g. Hays, 1971) to eleven (e.g. Hough & Dunnette, 1982, cited in Ones & Viswesvaran, 1997). This lack of universality makes it difficult for research findings to be compared, and for the results to be easily generalised or used in practice. A further limitation is the fact that many models are subjective, informal, and rationally based, without the grounding of any formal theoretical models of performance during development (Arthur & Bennett, 1997).

The debate surrounding generalising domestic job performance models to the expatriate job performance is another area of concern within the expatriate job performance field (e.g. Tett, Guterman, Bleier, & Murphy, 2000). Generalising domestic job performance models to assess the context specific expatriate job performance entails the risk of incorrectly assuming that the specific performance examples from within the general job performance categories are comparable with regard to function, causes, measurement, and value of expatriate job performance. For example, effort and initiative dimensions are included within the model of expatriate job performance by Sinangil and Ones (2001). Within a Western cultural, these constructs are closely related and regarded as positive and productive elements of performance. However, other cultures may value such constructs differently within their organisational communities.

For example, initiative may be viewed as counterproductive in more collectivist and dutiful cultures, such as Japan. Such issues highlight the issues of whether generalising domestic job performance models and the incumbent dimensions are appropriate in such multicultural contexts.

Other researchers have placed emphasis on incorporating the unique features of expatriate job performance. Tett and colleagues (2000) argue that by doing this, the increased specificity will lead to a better person-situation fit, which in turn allows a better understanding of the causes, effects and measurement of expatriate job performance. Solely using a domestic model of job performance for conceptualising expatriate job performance may be questionable. However, even specific expatriate job performance criteria must be carefully conceptualised to avoid confusing the outcome criteria. For example, Sinangil and Ones (2001) disputed some of Hough and Dunnette's (1992) behavioural dimensions of expatriate job performance because some of the dimensions reflected adjustment-type criteria (e.g. adjustment to living abroad). As highlighted earlier in the chapter (Section 5.1.9), adjustment and its dimensions are believed to be determinants or predictors of job performance, not the criterion itself.

The measurement of expatriate assignment job performance also shares some of the limitations involved in measuring domestic job performance, but with added cultural complexities. As highlighted above, different cultures may value different aspects of performance and what is important in one country may not be important in another (Chiang & Birtch, 2010). Katz and Kahn (1978) suggest that individuals within an organisation can have different perceptions and mental representations of the factors and behaviours necessary for success in the occupation. What colleagues view as important for good job performance may be different from supervisors' views, and recently, rater's goals have been found to bias ratings given the other employees (Wang, Wong, & Kwong, 2010). This issue is especially important when it comes to assessing the expatriate's job performance. Subjective supervisor ratings carried out by host country supervisors (and colleagues) may value and interpret employee actions and behaviours differently compared to the expatriate's home culture supervisors. This can bias the criterion and diminish reliability (Cook, 2004). Even if the home country supervisor rates the expatriate's performance, it is questionable whether this can be done reliably, accurately, and practically because the expatriates are not performing within close and observable proximity to the home supervisors.

Overall, numerous approaches and models have been suggested to conceptualise and measure expatriate job performance, which in turn raise questions over the operationalisation and conceptualisation of expatriate assignment success. However, organisations are interested in an expatriate's performance (Aycan, 1997), so research should attempt to find performance predictors for it in a pragmatic and reliable way. Using a purely domestic approach appears to be too general to accommodate the complexities of the expatriate assignment. Therefore, using more specificity to conceptualise expatriate job performance appears important, providing organisations see the value and applicability of the chosen model. However, like domestic job performance, it is not an easy or unambiguous criterion to use, and further research is required in order to develop a sound theoretical model.

5.2.3 Returning home early. The most basic conceptualisation of expatriate assignment success is whether or not an expatriate returns home early (Caligiuri, 1997).

According to this outcome measure, an expatriate assignment is considered to be successful when an expatriate employee does not return home early from an assignment and completes the assignment on time (Black, 1988, Black & Gregersen, 1990; Tung, 1981). This uni-dimensional, dichotomous criterion variable is commonly used for statistics related to expatriate failure rates, (e.g. GMAC, 2008) and like job performance, is an outcome of interest to organisations (Aycan, 1997). Even research that uses other criteria as outcome variables use this behavioural outcome as a point of reference for whether or not an assignment is successful (e.g. Shaffer, et al., 2006). It is an objective and unequivocal conceptualisation and as a result is hailed as being the most valid criterion of expatriate success (Birdseye & Hill, 1995a; Kraimer & Wayne, 2004). However, there has been little research that has operationalised this behavioural criterion when examining expatriate assignment success.

Also referred to as turnover (e.g. Naumann, 1992), one of the main issues with using early returns as an outcome variable is the practical difficulties in collecting research data (Caligiuri, 1997). This measure of success can be used in two ways: retrospectively (i.e. after the expatriate has been repatriated), and longitudinally (i.e. following a sample of expatriates before, during, and after returning from their international assignments). The ideal way to investigate success using early return rates is through a longitudinal design. In order to conduct longitudinal research, strong organisational and expatriate commitment is very important as attrition can be highly problematic in such designs. Thus, small sample sizes may result, which create limiting implications such as low statistical power and external validity. Retrospective studies are sometimes viewed as problematic because factors causing turnover can only be investigated "after the horse has bolted" (Birdseye & Hill, 1995, p. 790). Organisations can be unmotivated to take part in such research as it does little to help current expatriates. Another difficulty in accessing these repatriated employees is due to the fact that expatriated employees may leave their organisation after they return (Adler, 1986). Even if organisational access is achieved, it has been suggested that using actual turnover data does not take into account situations where the expatriate may have been required to leave early, or when the duration for the assignment was not specified before leaving (Caligiuri, 1997). Ideally, research should be able to distinguish between expatriate-led and organisationally-led decisions to return home early from the expatriate assignment. However, this is seldom achieved in research using this criterion.

Researchers replaced the early return conception of expatriate assignment success in the early 1990s with withdrawal cognitions or the strength of expatriate employees' desire to leave prematurely their expatriate assignment (Gregersen & Black, 1990). This change was mainly due to the difficulty of researchers in collecting data on actual turnover or premature terminations of expatriate assignments (Shaffer, et al., 2006). Withdrawal cognitions were employed as a proxy for returning home early (Shaffer & Harrison, 1998) and for that reason have been used by researchers as an alternative measure. However, there remains little empirical evidence to substantiate the synonymous use of intention to leave an expatriate assignment early with the behavioural act of actually leaving the assignment early, although many studies have assumed this relationship (e.g. Garonzik, Brockner, & Siegel, 2000; Naumann, 1992; Shaffer & Harrison, 1998).

Overall, conducting expatriation research using the assignment completion conception of expatriate success has been difficult, and as a result, many studies have used an unsubstantiated proxy for investigation. This proxy conception has become more popular among academic researchers, yet organisations view success as actually completing the assignment (Aycan, 1997). Therefore, conceptualising expatriate assignment success as completing the assignment on time may be a useful approach to adopt in expatriate research. For that reason, more research is needed using the behavioural criterion of leaving the expatriate assignment early (Holopainen & Björkman, 2005), while reasons for leaving the expatriate assignment should also be included in an attempt to minimise confounding effects highlighted above.

5.2.4 Section summary. This section presented the approaches used to define expatriate assignment success. Within the expatriate research literature, the main conceptualisations of expatriate assignment success include expatriate adjustment, performance, and leaving or intending to leave the assignment early. The lack of consistency and clarity in conceptualising expatriate assignment success is viewed as a key reason why organisations are reluctant to incorporate the findings of academic research into practice. Therefore, researchers attempting to reduce the discrepancy between research and practice must conduct research that will produce results of interest to organisations and practitioners.

5.3 A New Dimension of Expatriate Assignment Success

Whether the expatriated employee would go on another assignment was also considered to be an important issue for participants in study one. Bossard and Peterson (2005) investigated this in a group of US repatriates; the rationale for this question unclear. The responses collected were mixed, as were the responses recorded in study one. However, Bossard and Peterson noted that positive experiences were typically related to willingness to go on another assignment. This question may reflect an indirect measure of the expatriated employee's perception of the experience (i.e. positive or negative) and its success. However, other factors were also considered important with regards to whether or not an employee would relocate again. For example, family circumstances may prevent being able to go abroad again in spite of a positive expatriation experience. Therefore, it would be a useful addition to the conceptualisation of expatriate assignment success but insufficient on its own. This suggestion is supported by a British expatriation study by Forster (1997). Forster explored expatriate attitudes toward future international assignments (IAs) and the results showed that almost half of the expatiates were "unenthusiastic" about future IAs. Implications of this are "worrying [...] for companies who want to develop truly international managers from among their UK work-force" (p. 428). Therefore, Forster argued that a broader definition of expatriate failure should be considered.

5.4 Review Summary and a Proposed Model

This discussion of the research literature and existing knowledge around the nine factors that were perceived by British repatriates as important for organisations to consider when attempting to facilitate successful expatriate assignments. These factors reflected individual, organisational, and contextual-level factors. The conceptualisation of expatriate assignment success was discussed, highlighting the lack of consensus over how best to conceptualise this form of success. A new dimension of expatriate assignment success was highlighted from study one, which reflected the expatriated employee's willingness to go on another expatriate assignment. Overall, these predictors and outcomes from study one (including an extended conceptualisation of expatriate assignment success) can be brought together into an inductively derived working model of British expatriate assignment success. This is displayed in figure 5.2. Further empirical investigation must be carried out to assess the validity of the model in order to ascertain its validity and utility. This is the aim of the latter stages of the present thesis.

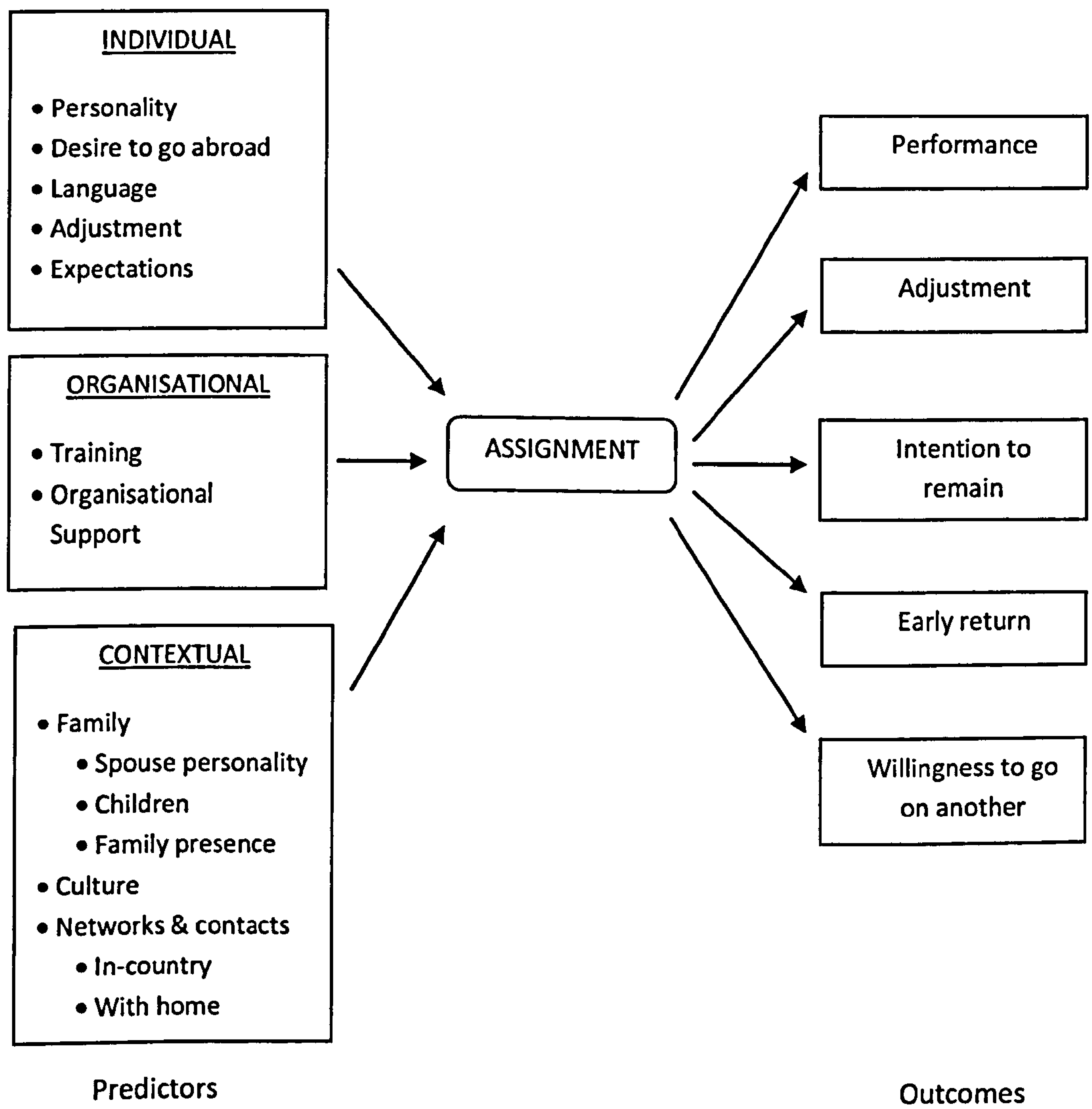

Figure 5.2 Hypothesised model of British expatriate assignment success

6. Phase Two - Study Two

6.1 Introduction

The results of phase one highlighted the importance of the organisation selecting the "right kind of person". This practical application of expatriate personality has been a popular topic within the expatriate field. Both practitioners and experts agree that effective selection is the major mechanism to achieve expatriate success and reduce failures (Bolino & Feldman, 2000; Sieveking, Anchor, & Marston, 1981). According to Sinangil and Ones (2001), "all good employment practices start with good recruiting and selection" (p.425). Smith, Gregg and Andrews (1989) have argued that in almost all cases, investment in selection procedures is one of the best investments an organisation can make, with cumulative benefits over many years. Anderson and Herriot (1997) supported this hypothesis, arguing that more effective selection is associated with better work and ultimately better team and organisational performance.

An extensive corpus of research has accumulated in recent decades, exploring and identifying important characteristics and skills for expatriates to posses. However, this knowledge is seldom incorporated into practice by organisations, resulting in poor and inappropriate selection frequently occurring (Forster & Johnsen, 1996). In a recent Global Relocation Trend Survey (GMAC, 2008), 21% of respondents agreed that selecting the right candidate was the most important issue for a company using expatriate assignments. However, in the 2005 survey, almost all participating organisations rated selection as the primary issue for expatriation failure (GMAC, 2008).

Expatriate selection methods have been heavily criticised as being informal (Harris & Brewster, 1999a), subjective and ad hoc (Forster & Johnsen, 1996). Various methods are used across different countries, but overall there is an over reliance on technical competence as the preferred selection criteria by multinational organisations (Tungli & Peiperl, 2009). The underlining assumption is that technical competence is universal and domestic performance equates to overseas performance (Mendenhall & Oddou, 1985). However, domestic performance does not mean the individual will perform well abroad, and such an assumption is widely acknowledged as outdated (Porter & Tansky, 1999; Shilling, 1993). The role of an expatriate is unique in the sense that it is not just job content (i.e. duties, tasks, role, position or title) that is important to consider when selecting; the job context (i.e. working internationally) also plays a crucial role in the success of an assignment (Caligiuri, et al., 2009). Working abroad requires additional soft skills (Harris & Brewster, 1999a) that should be incorporated into the selection decision process. According to Sinangil and Ones (2001) most organisations know that such skills and personality characteristics are important. However, in practice they are often not utilised fully for selection. In other words, there is a strong divide between what is proposed by academics as best practice based on research evidence and what is conducted in practice within organisations i.e. a research-practice gap.

This phase of the research addresses the issue of personality assessment in expatriate selection. Drawing on the potential barriers for the research-practice gap, a secondary aim of the research is derived, which seeks to contribute to the practical application of measuring expatriate personality as well as to the theoretical issues of personality measurement.

6.1.1 The gap between expatriate selection research and practice. There is growing concern regarding the increasing division between research and practice in personnel selection (Anderson, 2005). As a research-based professional practice, the field of selection psychology has seen a tremendous growth over the years. However, many commentators have noted signs that research and practitioner elements have been diverging in recent years (e.g. Anderson, Herriot, & Hodgkinson, 2001; Anderson, Lievens, van Dam, & Ryan, 2004; Dunnette, 1990). One of the results of this divergence is that developments in theory and knowledge, stemming from research, may not be recognised and used by practitioners within organisations. It is important that this gap is reduced so practitioners and organisations benefit from the outputs of academic research. To do this, research must acknowledge and accommodate for factors contributing to the gap (Anderson, et al., 2001). In the field of expatriate selection, there are several potential barriers.

The lack of application of expatriate research findings could be attributed to the perceived quality and relevance of the research findings. As discussed previously, expatriation research has stemmed mainly from North America and criticised for producing a biased perspective towards US national groups (Harris & Brewster, 1999a; Scullion & Collings, 2006). Organisations and practitioners working in non-US countries may question how appropriate it is to use selection methods based on research not carried out on employees from other nationalities. Without more research on other nationalities, the perceived bias by organisations and practitioners could remain and the gap may continue to diverge.

Many test publishers sell their psychological tests to a large number of countries (Harris, Brewster, & Sparrow, 2003). This internationalisation of psychological testing has led to a rise in concerns over the ethicality and fairness of applying tests across cultures

(Dowling & Welch, 2004). It has been suggested that problems exist regarding the suitability and comparability of using various international assignment tests in different cultures and nationalities (Clarke, 1993; Sparrow & Bognanno, 1993). Willis (1984, cited by Scullion & Collings, 2006) proposed that most of the relevant tests for international selection have been devised in the US and cannot be certified as culture-free. Researchers (e.g. Poortinga, 1989; Poortinga & Malpass, 1986) have argued that even the most sophisticated tests cannot be regarded as culture-free or appropriate for other nationalities. As a result, many organisations from various non-US countries can feel uncertain about whether using such tests are appropriate. Without sufficient validation evidence for other nationalities, caution over the use of psychometric tests for expatriate assignment selection may be justified, and according to Deller (1997), future research should control for such cultural influences.

The quality and generalisability of the research has also been question due to the size and nature of samples used in research. For example, much of the expatriate personality research has been conducted with Peace Corps volunteers and student samples. It has been argued that generalising results of research conducted on these samples is problematic due to these groups significantly differing from expatriate employees (Sinangil & Ones, 2001). Student and volunteer samples are said to be sought because they are easier and cheaper to recruit than expatriate employees (Deller, 1997). The difficulty of obtaining expatriate employee samples was illustrated by Arthur and Bennett (1995) who approached 1,828 organisations to ask permission to approach their employees for the research study. Only 3% of these organisations agreed to participate in the research. As a result, research studies frequently employ small sample sizes, including some studies conducting research on fewer than 60 participants (e.g. DiMarco, 1974; Shimoni, Ronen, & Roziner, 2005; Smith, 1966). Such small samples limit the statistical power of the research findings (Sinangil & Ones, 2001), which can lead to Type I or Type II errors. Overall, criticisms relating to over-generalising results and the conclusions based on non-expatriate employee populations, small sample sizes, and limited national groups are major limitations of the empirical evidence. These concerns can extend to the practitioner context by deterring organisations following recommendations suggested by research.

Conceptual-level concerns may also play a role in the research-practice gap. These conceptual concerns relate both to predictors of expatriate assignment success and expatriate assignment success itself. Regarding the former, predictors of expatriate assignment success have been conceptualised in various ways. For example, the long lists of characteristics produced by researchers can lead to confusion about which are the important predictors and how they can be measured. The conceptualisation of the criterion of expatriate assignment success is also regarded as a major reason for the divide between research and practice (Harris & Brewster, 1999b). Unless expatriate assignment success is clearly defined and measured, important predictor-criterion relationships may be questionable. Moreover, there appears to be a division between what academics and researchers conceptualise as success, and how practitioners and organisations conceptualise "success". These conceptual concerns are important and it is advised the researcher be clear about which approach they subscribe to and what the goals of the research are (Collier, 1989).

Overall, some of the main reasons why practitioners and organisations may not be applying what it advocated from expatriate research include the appropriateness of generalising research findings and available instruments for expatriate assignment selection. Not only that, but predictor and criterion conceptualisations are often unclear or inappropriate, meaning that research findings may not be viewed as relevant, and hence less widely applied in practice. Evers, Anderson and Voskuijl (2005) argued that "a strictly scientific, rational-economic logic may not be the best approach to getting our findings translated into common practice" (p.7). With an overall goal to help contribute to increasing expatriate assignment successes and reducing failures, the present research attempts to overcome the aforementioned limitations by developing and testing a psychometric instrument on a specific nationality, using data collected only from employee sample populations, and using "success" criteria that are appropriate both for research and practice. It will do this by grounding the personality measure within the Big Five framework advocated by researchers. However, for selection it is important to try and maximise the predictive validity of a test. One way this can be achieved in personality is through maximising the fidelity of the measure.

6.1.2 The fidelity-bandwidth trade-off. The trade-off between fidelity and bandwidth refers to the choice between either the quality of information obtained in measurement (fidelity) over the complexity of information obtained (bandwidth). It has been posited that in order to obtain high fidelity, the bandwidth of personality measures must be narrow. With increasing bandwidth comes lower fidelity. Hogan and Roberts (1996) used an analogy of binoculars versus a microscope to illustrate the fidelity-bandwidth trade-off. The former provides a wide field of vision with little detail, with the latter providing a small field of vision with substantial detail. Personality factors are comprised of groups of smaller facets or dimensions, which are narrower in focus. Therefore, Hogan and Roberts' analogy labels the overall personality traits themselves as the broader binocular and the dimensions as the more focused microscope. Ones and Viswesvaran (1996) called the fidelity-bandwidth trade-off a dilemma, specifically in selection, sparking an ongoing debate about whether it is better to use narrow or broad trait measures of personality in order to obtain the greatest predictive validity for workplace behaviours (Landers & Lounsbury, 2006). The debate is especially important for researchers and practitioners who attempt to identify linkages between personality traits and criterions, in order to generate supporting theory around trait-criterion relations and in turn, enhance the defensibility of using personality in selection systems (Hastings & O'Neill, 2009).

Ones and Viswesvaran (1996) argued that complex multidimensional criteria can only be adequately predicted by broad, multidimensional predictors. For that reason, they argued that general personality measures will always provide a better prediction of real-world criteria (e.g. job performance) than narrow bandwidth personality measures. Meta-analytical evidence from Barrick, Mount and Judge (2001) also suggested that broader personality traits have more predictive validity of job performance criteria (e.g. employee reliability, job proficiency) than narrower or constituent lower-level facet traits. However, numerous researchers have questioned the validity of Ones and Viswesvaran's (1996) evidence that favours broad personality measures (e.g. see Ashton, Jackson, Paunonen, Helmes, & Rothstein, 1995; Hogan & Roberts, 1996; Paunonen, Rothstein, & Jackson, 1999). A growing body of evidence is indicating that narrow trait measures may predict job performance better than broader global measures of personality. A meta-analysis by Dudley, Orvis, Lebiecki and Cortina (2006) examined the predictive incremental validity of narrow-trait conscientiousness and global conscientiousness on job performance. Results showed that the narrow-trait measures provided incremental predictive validity of job performance compared to global conscientiousness.

In the field of expatriation, the fidelity-bandwidth trade-off debate has not yet been fully explored. Many of the scales used to measure the various individual-level personality predictors of expatriate success can be associated with the Big Five global traits (Ones & Viswesvaran, 1997) but it is arguable that they more accurately reflect lower-level and more specific facet scales. As previously discussed (see Section 5.1.1.1), research has demonstrated relationships with specific personality scales and expatriate assignment outcomes. These findings suggest that expatriate assignment outcomes can be predicted by narrow-bandwidth personality measures. However, whether narrow bandwidth personality scales predict expatriate assignment outcomes better than global personality traits is still largely unknown. One study that has explored this issue indirectly is by Van der Zee and Van Oudenhoven (2000), who examined the validity of narrow personality trait measures and the global Big Five measure when developing and testing their narrow-bandwidth personality measure called the Multicultural Personality Questionnaire (MPQ). The researchers validated their measure against the Big Five and found that a narrow-bandwidth measure provided marginal incremental validity over the Big Five for predicting multicultural-related behaviour outcomes (international orientation and inspiration for an international career). This study provides some support for the advantage of using narrow-trait personality measures over broad trait measures of personality within an international context. However, it should be noted that only one of the reported increments achieved statistical significance (international orientation, $p < .10$).

One explanation for the incremental predictive power of narrow trait measures over broader bandwidth measures is because narrow traits have more specific definitions and content coverage, so relations with other variables may be better understood and predicted more easily (Schneider, Hough, & Dunnette, 1996). Although the Big Five is an important and parsimonious framework, the dimensions are proposed to operate at a general analysis level (McAdams, 1992) that can mask important information contained within the narrower facets. For example, if exploring whether a relationship exists between one global personality factor and returning home early from an expatriate assignment, at the facet level, three out of the six facets making up a personality factor may show a strong positive relationship, whilst the others show negative or no relationship. The net effect at the global factor level could be a non-significant relationship with the criterion. Tett and Christiansen (2007) refer to this as a "cancellation effect". In turn, whilst global personality dimensions may be appropriate for rough distinctions between personalities and an overarching picture of personality relations with other variables, they may be less valuable in predicting specific behaviours (John, 1989).

As a consequence of the debate, it has been argued that broad personality factors are most useful for theory development (Barrick & Mount, 2005; Ones & Viswesvaran, 1996), whereas narrower personality traits are more useful for prediction and understanding (Buss, 1989; Hampson, John, & Goldberg, 1986). Therefore, narrower personality trait measures are regarded as more important or beneficial for many applied purposes (Hastings & O'Neill, 2009). However, it is important to note that in prediction studies, narrow personality trait measures will not always provide higher validities than global factors. Barrick and Mount (2005) suggest that only when lower level personality factors and specific criterion constructs are linked together appropriately will additional and unique variance can be accounted for, resulting in larger magnitudes of relations. This issue of correctly matching predictor and criterion is an important issue. Paunonen and Ashton (2001) postulated that when criteria are specific or a low number of behaviours need to be predicted, fidelity should take precedence and narrow-bandwidth personality measures will be better predictors than broad, low fidelity trait measures. In other words, the criterion should dictate the predictors (Hogan & Roberts, 1996).

Given the importance of expatriate selection in achieving expatriate assignment success, the incorporation of a personality measure into the selection process, for example, could hold significant benefits for organisations (Caliguiri, et al., 2009). The measure of personality chosen should be able to predict the specific expatriate assignment success outcomes as much as possible. Therefore, a narrow-bandwidth personality trait approach could be argued as most appropriate.

6.1.3 Existing narrow-bandwidth expatriate personality measures. In Britain, there is growing popularity in the use of psychometric tests to identify individual differences (Shackleton & Newell, 1997; Zibarras & Woods, 2010). These tests are typically self-report and easy to use, meaning organisations can collect information about applicants quickly, cheaply, and with good predictive validity (see Arnold, 2005). Using psychometric tests for selecting expatriates could therefore be a pragmatic expatriate selection method, especially if these kinds of tests are already being used for domestic selection. This idea is not new as many tests and instruments have been developed (Graf & Hyland, 2005). However, many of these tests have little or no empirical evidence of their validity in being able to differentiate between successful and unsuccessful expatriate employees (Graf & Hyland, 2005; Sinangil & Ones, 2001). To date, only one expatriate personality measure that uses a narrow-bandwidth approach has been psychometrically tested.

The personality measure is called the Multicultural Personality Questionnaire (MPQ) and was developed to assess multicultural effectiveness defined as "success in the fields of professional effectiveness, personal adjustment and intercultural interactions (Van der Zee & Van Oudenhoven, 2000, p. 293). In its development, the MPQ was based on seven factors selected on the researchers' observations of what was consistently considered to be relevant to international assignee success. These factors included Cultural Empathy, Openmindedness, Emotional Stability, Orientation to Action, Adventurousness/Curiosity, Flexibility, and Extraversion. In contrast with general, global measures of personality, the MPQ scales were tailored to cover "more narrowly the aspects of broader traits that are relevant to multicultural success" (p.292). Factor analysis of the scales from data collected from students (n=257) studying in the Netherlands revealed that a four-factor structure best represented the data. These were labelled Flexibility, Social Initiative, and Openess (respectively), with Emotional Stability kept in its original form. Ninety-one items made up these four factors and internal reliability was high (alpha ranged between .70 to .90) with stability in alpha values shown after a two-month retest (n=75).

The following year (Van der Zee & Van Oudenhoven, 2001), a revised 78-item version of the MPQ was found to be comprised of five constructs, which were labelled Emotional Stability, Social Initiative, Openmindedness, Cultural Empathy, and Flexibility.

In two student samples (n=211[5] and n=119) results revealed high internal consistency of the scales (α= .80 to .91) and positive relationships with international involvement (except for the scale Cultural Empathy, which had an inverse relationship). Significant differences (higher rating for self-reports than the other-rater scores) were found for all scales apart from Emotional Stability. However, consistency between the self- and other ratings were found in the study (correlations were above .30) for four of the scales (Cultural Empathy was the exception, $r = .18$).

More recently, evidence has emerged that provides support to the psychometric properties of the MPQ on Italian (Leone, Van der Zee, Van Oudenhoven, Perugini, & Ercolani, 2005), English (Van Oudenhoven & Van der Zee, 2002), Asian student (Leong, 2007), and employee samples (Sharma, 2010). However, the value of such an instrument lies in its ability to provide better predictive relations than the global personality questionnaires. The MPQ has produced some promising results suggesting that narrow-bandwidth personality measures can predict important outcomes above and beyond broad personality measures in intercultural situations. For example, from the original development study (Van der Zee & Van Oudenhoven, 2000), the four factor MPQ was found to have incremental validity for predicting international orientation and inspiration for an international career. However, the latter was only significant at the .10 significance level. Results from the Italian version of the MPQ 78-item version also showed evidence of increased predictive validity for student international orientation over the broader bandwidth Big Five measure.

[5] In the paper, n was stated as 210, but the reason for this discrepancy is unknown (i.e. data removal or human error in reporting the samples sizes).

However, despite these promising results there are a number of limitations with the research carried out using the MPQ, which raise questions over its use in expatriate selection. This is due in part to the large proportion of research that was conducted using students including the initial development of the MPQ, which was based on a student sample not an expatriate sample. Although the researchers believed that such student samples have a relatively high chance of being sent abroad and that this should not influence findings or generalisability, student samples differ from employee samples in numerous important ways and as a result, findings based on student samples may be limited in terms of their generalisability to employment contacts (Leone, et al., 2005). In addition, validation of the MPQ was conducted using criteria that may not have been appropriate for expatriate employee samples (e.g. academic performance). Without evidence that the MPQ can predict criteria of interest to organisations (i.e. good performance and completion of assignment, Aycan, 1997) such research is unlikely to reduce the research-practitioner gap. Given the researcher's definition of multicultural effectiveness, the MPQ may struggle to attract organisations to use the instrument for expatriate selection.

Also, previous research has shown the factor structure of trait personality measures can differ when used on applicant samples (see e.g. Schmitt & Ryan, 1993). In this case of the MPQ, when non-student populations were used the results became mixed. For example, when examining the structure of the MPQ in job applicant populations (Van der Zee, et al., 2003; Van Oudenhoven, et al., 2003), the majority of items had cross-loadings greater than .30 on other factors. Unexpected relationships were also found when examining construct validities of the MPQ dimensions. Within an expatriate sample, although results showed good internal reliability (α = .64 - .89), and relationships with personal, social, and professional adjustment, small effect sizes over biographical data were found for incremental validity. From the perspective of an organisation, evidence from student samples does not make an instrument appealing to use, and because of the lack of convincing evidence from employees, there may be legal ramifications in using such an instrument for selection purposes.

Several studies (Leong, 2007; Van der Zee, Atsma, & Brodbeck, 2004; Van der Zee & Van Oudenhoven, 2000, 2001) have shown levels of internal reliability that are greater than .90. Generally, the higher internal reliability, the more the scale indicates that the incumbent items are closely related to one another and measure the same aspect of the construct. However, if the internal reliability of the scale becomes too high, it indicates that the items may not all be contributing some unique variance to the scale. This may mean that some of the items are virtually the same and may be redundant (Hulin & Cudeck, 2001). Such high levels of internal consistency may suggest that the scales in the MPQ may not currently be formed optimally. Recently, the structure of the MPQ was explored through CFA, and the results confirmed that the MPQ was not in its ideal form (Leone, et al., 2005).

One observation from the studies using the MPQ is an apparent lack of continuity between the original MPQ paper (Van der Zee & Van Oudenhoven, 2000) and follow-up studies (e.g. Van der Zee & Van Oudenhoven, 2001). In the original study, a four-factor structure was derived for the MPQ, collapsing the seven factors into four scales of 91-items. However, the following 2001 paper stated that "based on exploratory and confirmatory factor analyses of an original set of 138 items the MPQ was revised into a 78-item measure that assesses five constructs" (pp.279-80). These analyses, however, are not provided in the paper and clearly go against earlier findings. It was only several years after the original study that a rationale was given for the separation of the Openness factor into Openmindedness and Cultural Empathy scales (see Van Oudenhoven & Van der Zee, 2002). Accordingly, high inter-scale correlations have been found for these two scales, which is to be expected because of the "theoretical relatedness of the constructs" (Van Oudenhoven, et al., 2003, p.11). However, high inter-correlations could instead reflect underlying issues with the MPQ structure.

Another issue to note is the validation results found across the studies on the MPQ. The relationships between many outcome variables have been explored since the development of the MPQ, and although a reasonable number of significant relationships have been uncovered, they have not all been significant or in the expected direction. For example, in Van Oudenhoven and Van der Zee's (2002) study of adjustment not all of the facets of adjustment were found to be significantly related to the MPQ. Also, relationships with MPQ scales have been found in opposite direction from what was expected. Van der Zee and Van Oudenhoven (2001) found that although Cultural Empathy could discriminate between students with or without explicit international inspirations, those students with lower scores were found to have higher intentions to go abroad. This finding went against the researchers' expectations and together with other statistical anomalies with this particular dimension, researchers acknowledged the problematic nature of the scale and the need for "further studies on validity of this dimension" (p.285).

Overall, the MPQ has produced encouraging results and is presently the only narrow-bandwidth personality measure relevant to the field of expatriation that has had its psychometric soundness tested quite rigorously. Despite its appeal and supportive evidence, the MPQ has a number of limitations and unanswered questions. For the purposes of expatriate selection, is it unknown whether the MPQ can predict those who are most likely to complete or perform well on the expatriate assignment. Also, although the shortened version is more pragmatic and appealing choice for organisations, its foundation is questionable. There remains the need for a trait-based narrow-bandwidth personality measure for expatriate selection purposes that is not only pragmatic in application, but also psychometrically sound. Evidence must be shown for its reliability and validation on actual expatriate populations for the criteria that would lead to its practical application in organisations. In addition, development and validation must be also carried out on other nationalities if it is to enhance the chances of its use by practitioners. Using this approach, the current research attempts to develop and psychometrically assess a new expatriate personality measure for British employees.

6.1.4 A new narrow-bandwidth expatriate personality trait measure. A thorough review of the literature was carried out, which highlighted several important aspects of personality that can be related to each personality trait domain. It was decided to have three specific descriptions under each of the five domains to help provide sufficient coverage of the personality domain but with added specificity to the cross-cultural context. If the domain was too narrowly focused (i.e. focusing on one behaviour per trait) the scale may not adequately measure individual differences across these personality traits. Therefore, using a 3-strand approach to help develop items to capture each trait would provide sufficient breadth and necessary specificity through tailored items to create a narrower bandwidth coverage ideal for expatriate selection contexts. These strands reflect the personality trait conceptions or dimensions for item development. Overall, 15 narrow-bandwidth dimensions were created (see Table 6.1).

Table 6.1

Conceptions for the narrow-bandwidth personality trait scales

Big Five Personality Trait	Narrow-Bandwidth Conceptions
Openness to Experience	• Open to new ideas • Enjoys learning about new cultures • Low prejudice
Extraversion	• Initiates contact with new people • Cultural participation • Non-British friendships
Agreeableness	• Dislikes confrontation • Empathic to new cultures • Trusting
Emotional Stability	• At ease in new situations • Coping • Low negative affectivity
Conscientiousness	• Follows rules and norms • Self-efficacy • Organised preparation

Openness to experience is regarded as an important personality dimension for expatriates to possess if they are to perform well (e.g. Arthur & Bennett, 1997; Cheng & Lin, 2009), adjust in the new host culture (e.g. Huang, Chi, & Lawler, 2005; Tucker, Bonial, & Lahti, 2004; Waxin & Panaccio, 2005), and not leave the assignment early (e.g. Ones & Viswesvaran, 1999). An individual who is open to experience is believed to be open-minded, curious, and non-judgemental (Mount & Barrick, 1995). Within the expatriation literature, an expatriate who is open to experience is open to and interested in new ideas and cultures. An open-minded expatriate is said to enter a new country with fewer stereotypical beliefs and inaccurate expectations (Huang, et al., 2005). Arthur and

Bennett (1995) associated openness to experience with specific items such as being interested in new cultures and HCNs, being open, and having nonjudgementalness and racial/ethnic tolerance. Early work by Hammer and colleagues (1978) and Ronen (1989) also highlight the importance of being free from prejudice in order to be multi-culturally effective. Therefore, the present study referred to the openness to experience trait as referring to an individual who is open to new ideas, enjoys learning about new cultures, and has low prejudice.

Extraversion relates to the degree of social interaction an individual has, with an extrovert considered as being sociable and outgoing with others (Huang, et al., 2005). It is suggested that extraverts have the need and desire to communicate and interact with HCNs in order to understand the new culture (Black, 1990a; Searle & Ward, 1990a). Empirical research has found that extroverts are better adjusted (e.g. Armes & Ward, 1988; Swagler & Jome, 2005), effective (e.g. Deller, 1997), and perform better than introverts (e.g. Caligiuri, 2000a; Stierle, et al., 2002). It is believed to occur as a result of relationships with HCNs that allow the extraverts to effectively learn the social culture of the host country (Caligiuri, et al., 2009). Descriptions of extroverted expatriates include characteristics such as speaking actively and socialising more with HCNs (Huang, et al., 2005), initiating contact/social initiative (Van der Zee & Oudenhoven, 2000), a willingness to communicate with new people (Takeuchi, Yun, & Russell, 2002), participating in different cultural events (Shimoni, Ronen, & Roziner, 2005), and having many friendships with people who are of a different nationality to themselves (Ratiu, 1983). Therefore, the present study refers to extraversion as the degree to which an individual initiates contact with new people, engages in cultural participation, and has non-British friendships.

Agreeableness is associated with cooperation and being trusting (Norman, 1963). Highly agreeable individuals strive for acceptance and friendships with others (Huang, et al., 2005). Research has provided empirical support for the importance of agreeableness for expatriate assignment outcomes, including for adaptation (e.g. Deller, 1997), adjustment (e.g. Huang, et al., 2005), performance (Dalton & Wilson, 2000; Mol, et al., 2005) and the desire to terminate the assignment early (Caligiuri, 2000a). When a conflict arises, highly agreeable expatriates try to avoid it and seek to solve the problem in a manner customary with HCNs. These expatriate are believed to try and learn how HNCs think and accommodate for HCNs opinions and preferences when possible (Huang, et al., 2005). This cultural empathy is considered key to being intercultural effective (Cui & van den Berg, 1991) and being successful in an expatriate assignment (Tung, 1981). In the present study, agreeableness is referred to as the degree to which an individual dislikes confrontation, is empathic to new cultures, and is trusting.

Emotional stability (the positive pole of neuroticism), is concerned with an individual's ability to cope with stress in their environment (Buss, 1991). Individuals low in emotional stability are described as having a lessened emotional control, stability (Mount & Barrick, 1995), and negative affectivity (John & Srivastava, 1999) (i.e. high levels of negative emotions, such as anxiety, sadness; react badly to negative situations, Fortunato & Stone-Romero, 1999). These individuals are vulnerable to become emotionally upset easily and employ maladaptive coping strategies when in stressful situations (Lievens, Ones, & Dilchert, 2009). As the expatriate assignment experience is often associated with living and working in new and or ambiguous and unfamiliar environments (Stahl & Caligiuri, 2005), possessing high emotional stability is considered an important personality trait for expatriates to posses (Caligiuri, et al., 2009). Research supports the importance of this trait by demonstrating statistical relations with various expatriate assignment outcomes, such as adjustment (e.g. Armes & Ward, 1988; Swagler & Jome, 2005; Ward, Leong, & Low, 2004), performance (Mol, et al., 2005; Stierle, et al., 2002), intention to leave the expatriate assignment early (e.g. Aryee, et al., 1996; Stierle, et al., 2002), and effectiveness (e.g. Shaffer, et al., 2006). Therefore, the present study conceptualises emotional stability within a narrow-bandwidth as referring to an individual who is at ease in new situations, who can cope, and has low negative affectivity.

Finally, conscientiousness refers to individual characteristics of being organised, planning carefully, and following rules and norms (Lievens, et al., 2009). Conscientious individuals spend more time working on tasks, set their own goals and demonstrate persistence in achieving them (Ones & Viswesvaran, 1997). For this reason, conscientiousness is regarded as a motivational trait (Lievens, et al., 2009). For an expatriate that is high in conscientiousness, they will work hard on the assignment, perform tasks in an orderly and well-planned manner (Huang, et al., 2005) and have a strong motivational drive and belief that they can and do excel in the role (Lievens, et al., 2009). Research has demonstrated the significant relationships and importance placed on this personality trait for expatriate assignments outcomes, including adjustment (Lievens, et al., 2009), performance (e.g. Caligiuri, 2000a; Dalton & Wilson, 2000; Mol, et al., 2005), job satisfaction (e.g. Stierle, et al., 2002), and intention to complete the assignment (e.g. Ones & Viswesvaran, 1999). Therefore, assessing conscientiousness is important for expatriate selection and the present study refers to the trait as an individual that follows cultural rules and norms, has self-efficacy, and demonstrates organised preparation. These scale conceptions present the underlying conceptual framework used to construct the new personality measure in the study.

6.2 Method

6.2.1 Sample and materials. A sample of 402 British adult employees were opportunistically recruited to complete a questionnaire. Employees were sampled from over 40 organisations in the UK across various industries within the public and private sector. The sample consisted of 150 men (37.3%) and 232 women (57.7%), 20 participants (5%) did not disclose their gender. The average age (standard deviation) of the sample was 31.42 years (11.93), 16 participants did not disclose their age. This sample was chosen because future use of the new measure will be to assess this target population's likelihood of expatriate assignment success. The sample is also easier to access and collect data on than expatriates, which is important given the need to recruit a large sample for the necessary analyses.

6.2.2 Procedure and design. The procedure followed Hinkin's (1989) first three steps in the scale development process.

6.2.2.1 Item generation. A large pool of items were generated using the Big Five framework but, as the scale adopts a narrow-bandwidth approach, with increased specificity in the dimensions to reflect the cross-cultural milieu of expatriate assignments. This reflects a deductive-intuitive approach (Saucier & Goldberg, 2002) given the theoretical foundation of personality combined with judgements being made about the specific narrow-bandwidth item contents.

Overall, 123 items were generated by the researcher (see Appendix 2) with the expectation that at least half would be removed (Hinkin, 1998). Items were carefully designed to be short and simple (Hinkin, 1998), with clear language to be understandable items (Saucier & Goldberg, 2002) and promote content validity of the scales. To enhance content validity further, items were checked by another expert researcher. Scales were also balanced, meaning items were keyed both positively and negatively to the scale in question. This was done in an attempt to reduce response set bias (Price & Mueller, 1986 cited in Hinkin, 1989) and acquiescence (Saucier & Goldberg, 2002). Whilst conceptual and content validity are important, it is also important to use empirical approaches to assess scale validity. Therefore, items were removed and scales were created using a rigorous analytical/empirical approach (Saucier & Goldberg, 2002).

6.2.2.2 Questionnaire design and administration. Data was collected on the scales through distributing questionnaires. Each questionnaire comprised of information and consent form and a debriefing sheet. Demographic information of participants was also collected (age, gender), together with the new personality scales, and an existing measure of personality to provide an indication of the construct validity of the new narrow-bandwidth expatriate personality scales.

6.2.2.2.1 Expatriate personality scales. The 123 items were generated and arranged in a quasi-random order in the questionnaire to prevent order effects. Each item was answered using a 5-point likert scale response format, ranging from strongly disagree (1) to strongly agree (5).

6.2.2.2.2 Related constructs. For the purposes of construct validation, the BFI (John & Srivastava, 1999) was employed in order to measure the correlations between the expatriate personality scales and the Big Five personality dimensions. The BFI consists of 44 items measuring openness, extraversion, conscientiousness, agreeableness, and neuroticism within 5-point likert scales. The openness scale comprises of 10 items (Cronbach's alpha = .69). An example item is: "Is original, comes up with new ideas". The extraversion scale comprises of 8 items (Cronbach's alpha = .78). An example item is: "is talkative". The conscientiousness scale comprises of 9 items (Cronbach's alpha = .85). An example item is: "Does a thorough job". The agreeableness scale comprises of 9 items (Cronbach's alpha = .85). An example item is: "Is helpful and unselfish with others". The neuroticism scale comprises of 8 items (Cronbach's alpha = .76). An example item is: "Is depressed, blue".

6.3 Results

Initial item reduction of the generated items and assessment of construct validity involved four stages: (i) data screening and cleaning; (ii) preliminary analysis of the theoretical scales; (iii) exploratory factor analysis (EFA) to test the underlying structure of the scales, which are then checked for internal reliability; and (iv) the developed scales are examined for construct validity using the pre-established measure of the Big Five personality to determine whether expected correlations are achieved (i.e. convergent and discriminant validity).

6.3.1 Data screening and pre-analysis checks. The data set was checked for accuracy of input as mistakes may have occurred in the transference of responses in to SPSS. Any errors found were corrected before beginning the pre-analysis checks to ensure the data was suitable for EFA. Four main areas are important to address: missing data, the normality of the variables, outliers in the data, and the factorability of *R*. The guidelines of Ferguson and Cox (1993), together with recommendations by Tabachnik and Fidell (2007), Field (2005), and Garson (2008) were used to conduct these checks.

6.3.1.1 Missing data. Missing Values Analysis (MVA) was carried out using the guidelines specified by Tabachnik and Fidell (2007). Results of the MVA showed that the amount of missing data was very low (the average percentage of missing data for the scale items was .23%). Overall, responses from thirty-six participants contained at least one missing data point (range of one (.80%) to twenty-six (21.10%) missing data points). This overall low level of missing data provides support for the items having high face validity, as the items did not appear to bore participants enough to not respond (Van der Zee & Van Oudenhoven, 2000). There are presently no firm guidelines for how much missing data can be tolerated for a given sample size (Tabachnik & Fidell, 2007) or the best way to handle missing data. Therefore, pairwise data deletion of cases was used for subsequent analyses (as opposed to listwise deletion) in order to retain as much of the data as possible (Roth, 1994).

6.3.1.2 Outliers and normality

6.3.1.2.1 Univariate outliers. The data were explored for univariate and multivariate outliers. Standardised scores of the items (*z* scores) were examined, which showed 69 potential univariate outlying scores (0.13%) (value >3.29, Tabachnik & Fidell, 2005, p. 73). Outliers affect the distribution of variables and in turn subsequent multivariate analyses. Therefore, before deciding whether transformation of the data was required, inspection of the normality of variables was carried out.

6.3.1.2.2 Normality. As recommended by Ferguson and Cox (1993), skew and kurtosis values of the variables were examined. Results revealed no variables were skewed and four variables (3.25%) were kurtotic (i.e. coefficient values greater than +/- 2.0). Ferguson and Cox (1993) posit an acceptability level of 25% of variables showing non-normality would not adversely affect the final solution in EFA. As the percentage of kurtotic variables fell well within this acceptable limit, no transformation was carried out. In addition, the issue of homoscedasticity (variability of scores across variables is roughly equal) relates to the assumption of normality in which non-normality results in heteroscedastic data. For EFA analyses, heteroscedasticity is not fatal to the analyses but if accounted for can strengthen the results (Tabachnik & Fidell, 2007). As normality was acceptable, greater confidence in the results can be assumed as heteroscedasticity can be ruled out.

6.3.1.2.3 Multivariate outliers. Detecting multivariate outliers can be accomplished through various statistical methods. Two of the most readily available methods are Mahalanobis distance and Leverage (Tabachnik & Fidell, 2007). In the present study, multivariate outliers were examined through Leverage values and were examined for each of the five personality domains. Using the recommended cut-off value of .50 by Garson (2007), results revealed no multivariate outlying cases for the personality domains.

6.3.1.3 Factorability of R. The correlation matrix must meet certain psychometric requirements for EFA. Namely, that there is some systematic covariation between the variables of interest (Ferguson & Cox, 1993). Following the recommendations of Dziuban and Shirkey (1974, cited in Ferguson & Cox, 1993), two statistical tests were examined: the Kaiser-Meyer-Olkin (KMO) test, and the Bartlett tests of sphericity (BS). The KMO test of sampling adequacy indicates a smaller set of factors can account for the associations between the variables, whereas the BS tests the null hypothesis that there is no relationship between the variables. Results of the KMO test showed an output of .77, surpassing the minimum acceptable value of .50 (Ferguson & Cox, 1993), whereas the BS test showed a significant result (BS x^2 (7503) = 22514.29, $p < .001$). Overall, the results of the two tests indicate that relationships exist between the variables and a smaller set of factors can represent the relationships between the variables. Therefore, the factor analytic technique can be accepted as appropriate for the current dataset.

6.3.2 Initial scale refinement. Preliminary refinement of the theoretical scales was carried out through examination of the inter-item correlations. This was done to remove any poor fitting or redundant items as recommended by Hinkin (1998) for each personality domain, before conducting EFA, as ill-fitting items would skew the results and potentially produce a non-interpretable solution. Items within a similar domain should have similar interitem correlations as low correlations produce error and unreliability (Churchhill, 1979). Interitem correlations for the five personality scale domains were examined. The results are presented in the following sub-section. As negative interitem correlations suggest incorrect coding (Garson, 2008), negatively correlated items were checked for appropriateness and whether reverse scoring the item would alter the conceptual meaning of the scale. Hinkin suggested a cut-off interitem correlation value of .40, while other authors have suggested other lower minimum acceptable values have been recommended, for example .20 (e.g. Castelo, Barbosa, & Gavião, 2001). To avoid placing too strict criteria for item deletion and removing items that could be effective in predicting expatriate assignment success outcomes, a lower minimum acceptable value of .20 was used.

6.3.2.1 Openness domain analysis. Examination of the 29 Openness items revealed positive item-total correlations ranging from .07 to .56. However, two low negative correlations were found for item 123 (r = -.01; "Foreign workers do not have negative views about UK workers" (-)) and 127 (r = -.08; "I am comfortable with my own individual way of approaching a situation" (-)). Inspection of these items suggests that perhaps the items may be confusing for participants. It was decided to remove these items as reversing them would not make conceptual sense. The analysis was re-run iteratively until no negative correlations and no items with inter-item correlations lower than .20 remained. For the Openness domain, 22 items remained with a range of inter-item correlations of .26 to .57.

6.3.2.2 Extraversion domain analysis. Examination of the 19 Extraversion items revealed positive item-total correlations ranging from .19 to .51. Two negative correlations were found for item 9 ("I prefer to stand-back and observe a situation before I join in" (-)) and 23 ("A friend from another country could never truly appreciate my perspective" (+)). Item 9 (r = -.02) was a negatively-keyed item, but on reflection the item comprises of two elements that could be considered both a positive ("I prefer to stand-back and observe a situation") and a negative indicator ("before I join in"). The item was therefore considered poor and was removed from any further analysis. For item 23 (r = -.39), on reflection the item should be reversed as the item suggests a negative perspective towards non-British friendships. The analysis was re-run without item 9 and a reversed item 23. Items were checked for inter-item correlations below the .20 cut-off criteria and removed iteratively until no items had inter-item correlations below the minimum criteria. Overall, 18 items remained with a range of inter-item correlations of .20 to .52.

6.3.2.3 Agreeableness domain analysis. Examination of the 24 Agreeableness items revealed only positive item-total correlations ranging from .03 to .50. A number of items fell below the chosen minimum acceptable inter-item correlation value and were therefore removed from any further analysis. The analysis was conducted iteratively until no items had inter-item correlations below the minimum criteria. Overall, 18 items remained with a range of inter-item correlations of .21 to .50.

6.3.2.4 Emotional stability domain analysis. Examination of the 26 Emotional Stability items revealed positive item-total correlations ranging from .10 to .48. One item, item 21 ("I feel guilty when I do not understand someone from another culture" (-)) had a low negative inter-item correlation (r = -.03). Inspection of the item suggested that reversing it would not make conceptual sense. The item was therefore removed from any further analysis, and the analysis was re-run iteratively until no items had correlations below the minimum value of .20. Twenty-four items remain within the Emotional Stability domain with an inter-item correlation range of .28 to .49.

6.3.2.5 Conscientiousness domain analysis. Examination of the 25 Conscientiousness items revealed positive item-total correlations ranging from .03 to .31, and five negatively correlated items. First examining each the negatively correlated items, item 32 ("I prefer to go with the flow" (-)) had a low negative correlation (r = -.09). Conceptually it would not make sense to reverse the direction of this item. Therefore the item was removed from any further analysis. Secondly, item 63 ("I believe many unforeseen events are likely when travelling in a new country" (-)) was created within the organised preparation element of the domain and had a low negative correlation (r = -.06). Looking retrospectively at the item, it does not appear to map strongly onto this element and reversing it would not make the item more conceptually relevant. This item was then removed from further analyses. Thirdly, item 80 ("There is no better way of learning about a new place than discovering it on your own" (-)) was the next negatively correlated item (r = -.12) and when re-examining the item, it appears to focus more on whether or not the individual prefers to be on their own or with other people, as opposed to being organised or not. It was therefore decided to remove the item from further analysis due to the low conceptual relation with the domain. Fourthly, item 105 ("I prefer the surprises of a new country" (-)) also had a low negative correlation within the domain (r = -.10). Similar to the above item, in hindsight the item appears to be conceptually related to excitement seeking as opposed to being organised. This item was also removed from further analysis. Fifthly, item 37 ("Problems that arise in a different country would be difficult to solve" (+)) is the final negatively correlated item (r = -.06), which when re-examined revealed that the item would make more conceptual-sense if it was reversed. This item was therefore recoded appropriately and the analysis was re-run on the remaining 21 items. Several items had inter-item correlations below the minimum .20 cut-off, which were subsequently removed and the analysis conducted iteratively until no items fell below the minimum acceptable level. Overall, 11 items remained within the Conscientiousness domain with an inter-item correlation range of .21 to .40.

6.3.4 Exploratory factor analyses (EFA). The remaining items were then subjected to EFA, following the recommendations of Ferguson and Cox (1993). First, the number of underlying factors to extract was determined using a Scree Plot and items were then subjected to EFA with rotation. Internal consistencies of the extracted factors were then checked using Cronbach's alpha and inter-item correlation coefficients to ensure that only reliable factors and items were retained for the personality scales. This process was conducted iteratively until a stable and reliable set of scales were produced.

6.3.4.1 Final EFA Extraction. After two iterations, a final EFA was re-run on the remaining 42 items, which indicated a three factor structure from the Scree Plot (see figure 6.1).

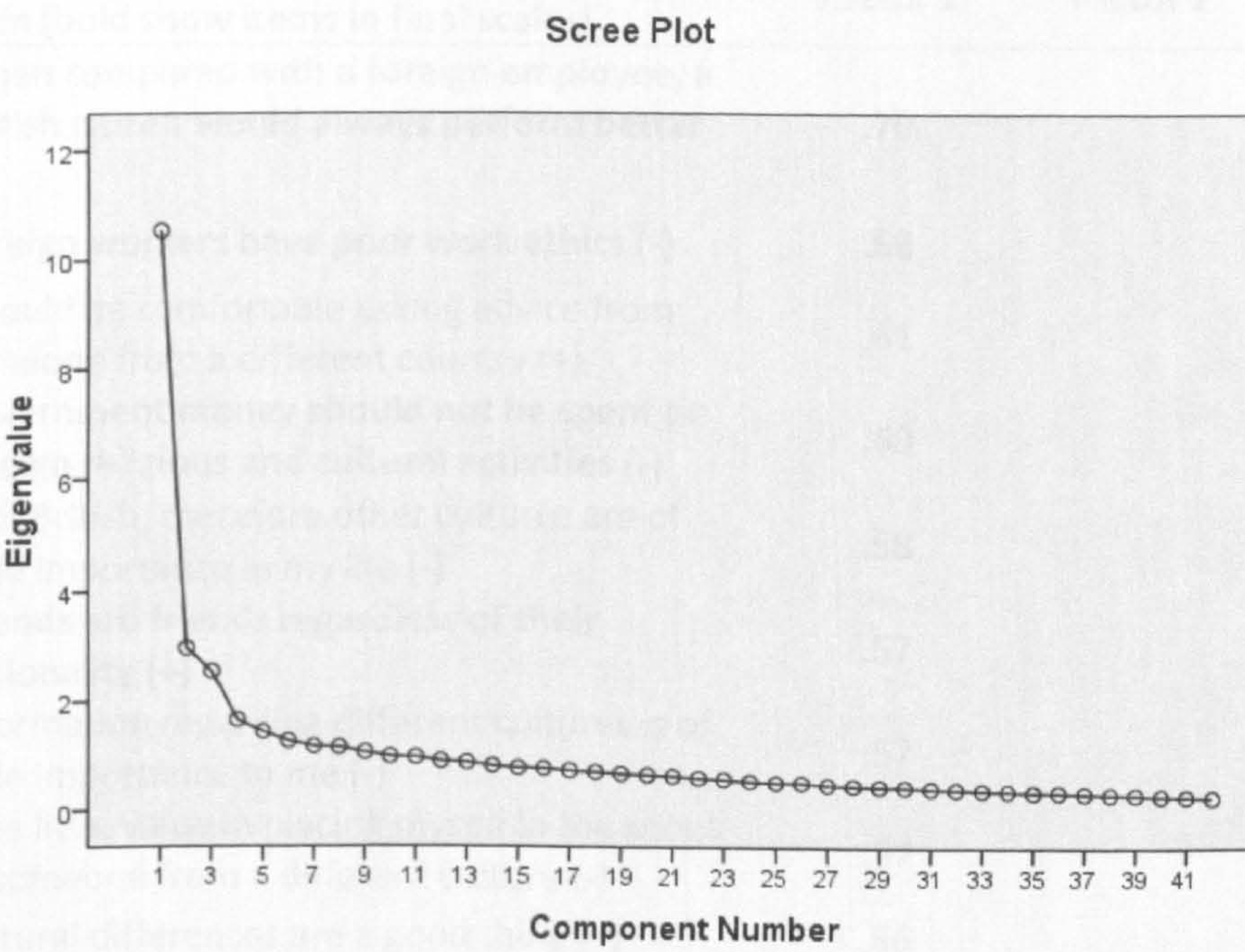

Figure 6.1 Scree plot on the remaining 42 personality items.

6.3.4.1.1 Rotation. A PCA specifying three components was conducted with oblique (direct oblim) rotation as the five factor structure did not emerge, suggesting overlapping factors. The KMO measure verified the sampling adequacy for the analysis, KMO=.90 and the BS x^2 (861) = 6176.07, $p < .001$, indicating sufficiently large associations between the variables for PCA. The two components in combination explained 38.26% of the variance. As above, inspection of the component correlation matrix confirmed the non-orthogonal structure with factor 1 and 2 correlating above .30 (r =.32), and factor 2 and three correlating above .30 (r = -.34). The structure matrix was therefore used for interpretation and the factor loadings are displayed in table 6.2.

Table 6.2

Factor loadings of items in the three-factor structure revealed from the structure matrix

	Rotated Factor Loadings		
Item (bold show items in final scales)	**Factor 1**	**Factor 2**	**Factor 3**
When compared with a foreign employee, a British citizen would always perform better (-)	**.70**		
Foreign workers have poor work ethics (-)	**.68**		
I would be comfortable asking advice from someone from a different country (+)	.61		
Government money should not be spent on foreign religious and cultural activities (-)	**.60**		
I am British; therefore other cultures are of little importance in my life (-)	.58		
Friends are friends regardless of their nationality (+)	**.57**		
Information regarding different cultures is of little importance to me (-)	.57		
I see little value in placing myself in the shoes of someone from a different culture (-)	.57		
Cultural differences are a good thing (+)	.56		
Sometimes, it is appropriate to conform to different cultural behaviours and traditions (+)	.55		
Having a friend from another country requires a lot of patience and effort (-)	.54		
I see my own culture as different from others rather than better or worse (+)	**.53**		
I like people to be wary of me (-)	.53		
I like people from all countries to feel relaxed around me (+)	.52		
The closest friendships are always with people who share your nationality (-)	.52		
I enjoy visiting and exploring new places (+)	.52		
I think that UK jobs should always be offered to a UK citizen first (-)	**.51**		
If we are to conduct business with another country, we should be open to 'their' ways of doing things (+)	.51		

cont. Table 6.2

Regardless of country, people can always find ways to communicate (+)	**.50**		
If people choose to live in this country they should live by our culture and religion (-)	**.50**		
I'm confident that I would get along with people from another country (+)	**.49**		
It is easy to appreciate calls from foreign workers for equal opportunities in the workplace (+)	**.47**		
I am slightly apprehensive about new cultural experiences (-)		**.71**	
New cultural experiences tend to make me feel tense (-)		**.71**	
I would be very anxious about working in a new country (-)		**.67**	
Living in a different culture would be a stressful experience (-)		.63	
New situations make me feel uneasy (-)		**.62**	
I would not be worried about working in a different country (+)		**.57**	
It does not worry me about being in a new cultural situation (+)		**.53**	
I find it daunting to approach people who are not from this country (-)		.52	
I have little desire to explore new places (-)		.50	
Novel situations often overwhelm me (-)		**.50**	
I enjoy participating in new social situations (+)		**.49**	
I often think about what it would be like to live and work in a different country (+)		.47	
I enjoy engaging in different cultural festivals (+)			**-.75**
I enjoy theoretical discussions about different cultures (+)			**-.69**
I am fascinated by the work ethics of different countries (+)			-.68
I like to try and put myself in the shoes of someone from a different culture (+)			-.68
I am interested in different religions (+)			**-.67**
I enjoy the excitement of different cultural situations (+)			**-.62**
I like to understand culturally specific behaviour (+)			-.59
I favour the full integration of foreign employees in the UK (+)			-.47

cont. Table 6.2

Eigenvalues	10.54	2.97	2.56
% of variance	25.09	7.08	6.08
α	.90	.82	.83

The final three-factor solution showed acceptable internal reliabilities. The high internal reliability of factor 1 (i.e. .90) suggests that the scale is not in its ideal form and could have overlapping items (Streiner, 2003). Further refinement of the scales must therefore be carried out (see Section 6.3.5). Also, the negative loadings of factor 3 highlighted the need to reverse the direction of the items for interpretation and defining.

6.3.4.2 Factor naming and defining. The three factors were then defined and named based on the incumbent items (noting the need to reverse the item direction for factor 3) and the scales the items originally belonged to. Factor 1 was labelled Inter-cultural Openness and is associated with being open and unprejudiced to new cultures and people of different cultures. Individuals who score high on this scale do not view people from other cultures as inferior because they are not from the UK, are happy to have friendship with people who are of a different nationality, and feel comfortable speaking to someone who is a not a native to the UK. Individuals who score low on this scale hold prejudiced view of people from different cultures, perceiving them to be different and unequal.

Factor 2 was labelled Cultural Apprehension and is associated with being anxious and apprehensive about new cultural experiences. Individuals who score high on this scale do not worry or feel tense about being in a new cultural environment. Individuals who score low on the scale feel nervous about being in a different culture or country, and can sometimes be overwhelmed in these novel situations.

Finally, factor 3 was labelled Cross-Cultural Disinterest and is associated with an individual having little interest in or excitement by new cultures, which includes not engaging in and discussing different cultures. Individuals who score high on this scale do not take part in different cultural activities and are not interested in understanding the perspective of someone from a different culture or their beliefs, such as their religion. People who score low on this scale enjoy engaging in and are excited about being in a different culture.

6.3.5 Item assignment exercise: Conceptual analysis strategy. As highlighted above, further refinement of the scales was necessary. Therefore, using the definitions generated from the outcome of the analyses, an item assignment exercise was used to test the definitions and provide a conceptual strategy to ensure items could be appropriately associated with their factor and remove any items that did not conceptually relate to each other, as well as ensuring that the item is loaded on the factor that is most conceptually appropriate (i.e. helping ensure content validity). Using this approach also helped remove individual researcher bias when attempting to refine the scales further.

Three social science researchers completed the item assignment exercise (see Appendix 3). Results were compared against the correct item placement and only items that were correctly assigned by two of the researchers were retained. This provided a statistical and conceptual set of scales. For factor 1, 12 items were correctly assigned; factor 2 had 8 items correctly assigned; and factor 3 had 4 items were correctly assigned. Internal reliability of the scales were recalculated, which all showed good levels of internal reliability (i.e. Cronbach's alpha values .82, .79, and .76, respectively). These scales were then used in the subsequent research and are shown in bold in table 6.2.

6.3.6 Construct validity: Convergent and discriminant validity. The final set of developed expatriate personality scales were explored for their construct validity. This was done through assessing the scales correlations with the BFI scales to assess the degree of convergent and discriminant validity.

The final set of scales was calculated using the mean value of the items. Descriptive statistics of the three scales and the BFI personality scales were calculated and are displayed in table 6.3.

Table 6.3

Descriptive statistics of the expatriate personality scale scores (inter-cultural openness, cultural apprehension, and cross-cultural disinterest) and the BFI personality scale (openness, extraversion, agreeableness, conscientiousness, and neuroticism)

Variable	n	Mean	SD	Skewness	Kurtosis
Inter-Cultural Openness	402	3.69	.56	.40	.45
Cultural Apprehension	402	3.24	.62	-.03	-.49
Cross-Cultural Disinterest	402	2.63	.79	-.19	-.31
Openness	402	3.38	.51	-.31	.36
Extraversion	402	3.29	.61	-.08	.32
Agreeableness	402	3.57	.67	.68	.09
Conscientiousness	402	2.47	.69	.69	.14
Neuroticism	402	2.83	.62	-.04	-.47

Pearson's Correlation Coefficients (r)) between the variables were conducted and are reported and displayed in table 6.4.

Table 6.4

Correlations between the expatriate personality scale scores (inter-cultural openness, cultural apprehension, and cross-cultural disinterest) and the BFI personality scales (openness, extraversion, agreeableness, conscientiousness, and neuroticism)

Variable	1.	2.	3.	4.	5.	6.	7.
1. Inter-Cultural Openness							
2. Cultural Apprehension	.35**						
3. Cross-Cultural Disinterest	-.50**	-.35**					
4. Openness	.37**	.26**	-.42**				
5. Extraversion	.13**	.39**	-.18**	.28**			
6. Agreeableness	.19**	.06	.01	.24**	.25**		
7. Conscientious-ness	.01	.00	.10	.19**	.23**	.60**	
8. Neuroticism	-.15**	-.30**	.03	-.12*	-.34**	-.44**	-.41**

Note. * $p < .05$ (two-tailed). ** $p < .01$ (two-tailed).

Results suggested that the expatriate personality scales are significantly related to each other as expected from the earlier factor analyses. In particular, cross-cultural disinterest was negatively related to inter-cultural openness (r = -.50) and cultural apprehension (r = -.35).

The potential relationships with the five personality factors could be based on the personality trait from which the items were initially developed. For example, inter-cultural openness contained items that were developed primarily from the personality trait openness, with two extraversion items, and one item from agreeableness. Cultural apprehension is primarily composed of items developed from the emotional stability/neuroticism personality trait and one item from the extraversion trait. Finally, cross-cultural disinterest contains items from the extraversion and openness personality traits. Correlations with the BFI personality scales would be expected to be highest with the scales that reflect the traits that the expatriate personality scale items were derived from. Conversely, no or low correlations are expected with the traits that do not have any respective items contained within the new expatriate personality scale. These relationships reflect the convergent and discriminant validation that is required for demonstrating construct validity. The correlations presented in table 6.4 show the relationships from the present dataset.

For inter-cultural openness, significant positive correlations were found with openness (r = .37), agreeableness (r = .19), and extraversion (r = .13). A significant negative relationships was shown between inter-cultural openness and neuroticism (r = -.18). No significant correlation was found with conscientiousness. This provides partial support for the convergent and discriminant validity of the first expatriate personality scale.

For cultural apprehension, significant positive relationships were found with extraversion (r = .39), and openness (r = .26). A significant negative correlation was found with neuroticism (r = .30). No significant correlations were found with agreeableness and conscientiousness. These results provide partial support for the convergent and discriminant validity for the second expatriate personality scale.

Finally, for the final expatriate personality scale, cross-cultural disinterest, significant negative relationships were found with openness (r = -.42) and extraversion (r

= -.18). No significant correlations were found was agreeableness, conscientiousness or neuroticism. These results provide support for the convergent and discriminant validity of the third expatriate personality scale.

6.4 Summary and Conclusion

The present study aimed to develop narrow-bandwidth personality scales based on the Big Five personality traits focusing on the expatriation context. These were developed using an iterative empirical and conceptual development process. After several stages of development, a three-factor solution was produced. The results suggested that the scales could be further refined. These three factors were then subjected to further refinement using a conceptual item assignment exercise assessing the adequacy of the factor definitions and item relatedness. After examination of the inter-rater consistency of item assignment, three factors containing 12, 8 and 4 items were produced. These factors were labelled inter-cultural openness, cultural apprehension, and cross-cultural disinterest, respectively.

The validity of the factors was also assessed. Low amounts of missing data suggest the scales have content (face) validity. Examination of the construct validity of the expatriate personality scales through convergent and discriminant relationships with a previously validated personality measure suggested that the personality factors had some construct validity (i.e. some of the expected relationships and non-relationships were found).

Overall, an unexpected set of narrow-bandwidth personality scales were developed. However, reliability and partial validity of these scales were demonstrated. Further assessment of the expatriate personality scales' psychometric rigour must be carried out, including an assessment of the scales' criterion validity. Further construct validation must be explored as the new scales reflect a different set of conceptual underlying constructs. This is carried out in phase three of the present research.

7. Phase Three - Background and Methodology

7.1 Introduction

Phase one derived a number of important factors that expatriated British employees perceived as important for contributing to successful assignments. The study also identified an important outcome to consider when examining whether an expatriate assignment was successful or not. These results were combined to form a working model for expatriate assignment success (figure 7.1).

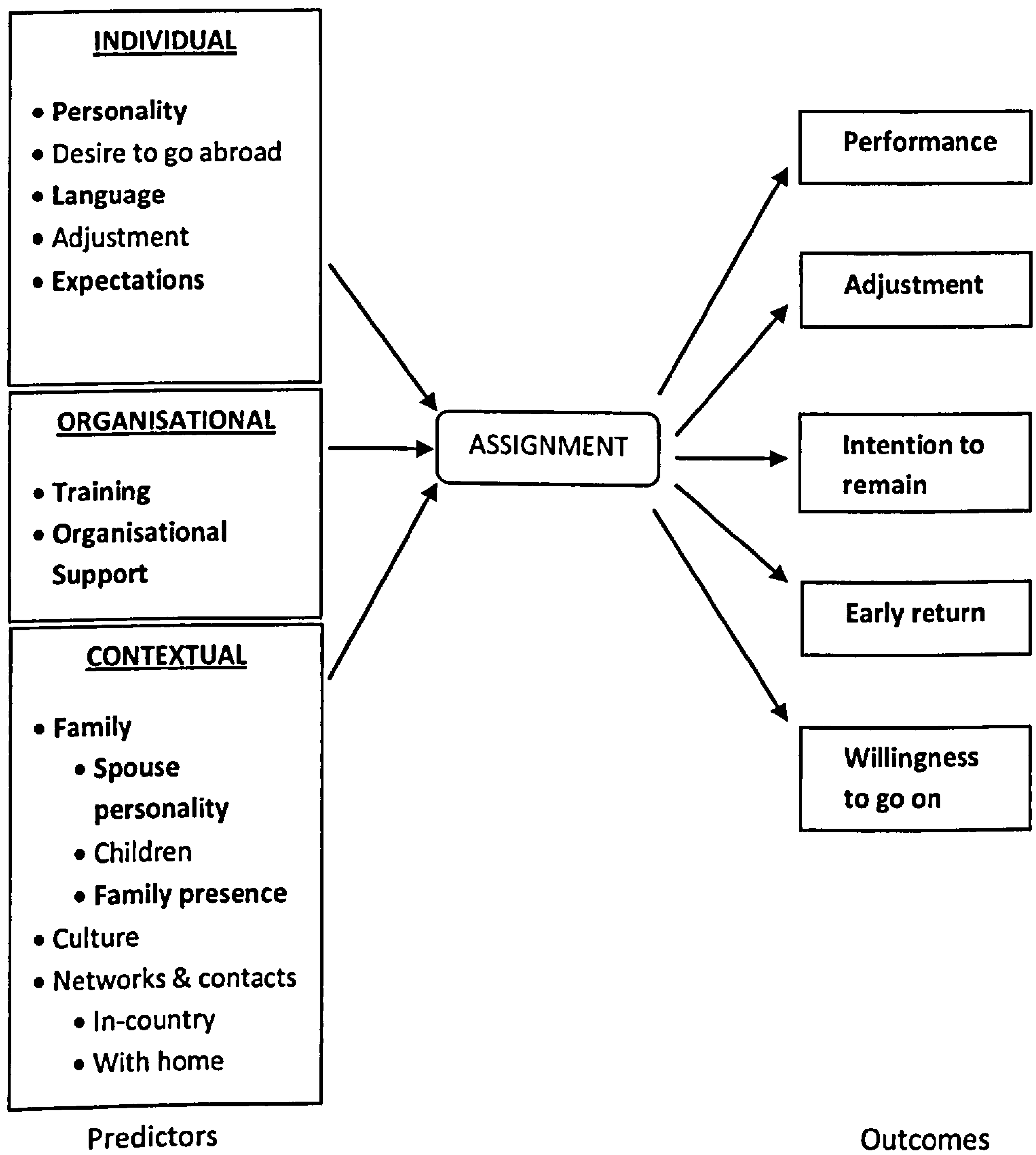

Figure 7.1 Hypothesised model and variables to be tested (in bold)

The first aim of the study is to quantitatively assess the degree to which the inductively derived predictors from study one are related to expatriate assignment outcomes in British expatriate populations (i.e. test two-tailed hypotheses). Due to the large number of variables identified, only the most prevalent predictors from study one were chosen in order to remain pragmatic (highlighted in bold in figure 7.1). The questions and hypotheses generated around these variables are presented in more detail in section 7.1.1.

In an attempt to make the most from the data gathering process, additional data was collected on the selected variables. This was done by embedding qualitative questions into the research design method in order to provide a supportive, secondary role to the quantitative data (Creswell & Plano Clarke, 2007). The information collected in this format will compliment and support the earlier results and provide useful and important information to guide future research in the area. Therefore, as a supplementary aim to the first, this line of inquiry sought to investigate whether any further insights into the predictor-outcome relationships could be derived and highlight potential areas for future research. The specific qualitative questions are presented in more detail in section 7.1.1.

Lastly, phase two of the research drew upon one of the key findings from phase one, which highlighted the importance of personality and selecting the "right kind of person" for an expatriate assignment. As a secondary aim of the research, a new personality instrument was developed using a narrow-bandwidth approach grounded in the Big Five traits of personality. Following Hinkin's (1998) five stage process for scale development, phase two reflected the initial stages of development. The final phase of this research aims to complete Hinkin's remaining stages and further psychometrically assess the new personality scales.

From the discussion around the fidelity-bandwidth debate in phase two (see Section 6.1.2) a final set of hypotheses were generated and are presented in more detail in section 7.1.1.

The importance of personality was noted both for the expatriated employee and the accompanying spouse/partner. Therefore, a second questionnaire was used to collect data from the accompanying spouse/partner of the expatriate participant. The embedded mixed methods design was also used for the same reasons as above, and the research questions and hypothesis posed in relation to this sample is also presented in section 7.1.1.

7.1.1 Research hypotheses. For the first aim of the study, seven hypotheses were posed in relation to the predictor variables selected for empirical investigation from phase one (see Table 7.1).

Table 7.1

Hypotheses for Study 3 (Research aim one)

Hypotheses (H)	Outcome Variables
H1: Expatriate personality will be significantly related to...	i. expatriate performance ii. adjustment iii. intention to leave the assignment early (expatriate sample only) iv. not returning home early (repatriated sample only) v. willingness to go on another expatriate assignment
H2: Expatriate spouse/partner personality will be significantly related to...	
H3: Expatriate family presence will significantly relate to...	
H4a: Whether or not the host country was an English-speaking country will be significantly related to... **H4b**: The expatriate's language fluency will be significantly related to...	
H5: POS will be significantly related to...	
H6a: The presence of expatriate assignment training will be significantly related to... **H6b**: The perceived relevance of expatriate assignment training will be significantly related to...	
H7: Expatriate expectations will be significantly related to...	

The qualitative questions primarily related to each of the predictors variables under investigation are displayed in Appendix 4, together with the qualitative questions used within the accompanying spouse/partner questionnaire.

For the second aim of the thesis, the reliability and validity of the new scales were further assessed. The hypotheses are displayed in table 7.2, whereby the issue of incremental validity addresses the issue around the fidelity-bandwidth debate. The comparative validity hypotheses were generated based on the results of study two.

Table 7.2

Hypotheses around the psychometric properties of the new personality instrument (Research aim two)

Psychometric Property	Hypotheses
Construct Comparative (Convergent & Discriminant)	**H8**: Inter-cultural openness will be (a) significantly positively related to openness, extraversion and agreeableness, and significantly negatively related to neuroticism; and (b) unrelated to conscientiousness. **H9**: Cultural apprehension will be (a) significantly positively related to openness and extraversion, and significantly negatively related to neuroticism; and (b) unrelated to agreeableness and conscientiousness. **H10**: Cross-cultural disinterest will be (a) significantly negatively related to openness and extraversion; and (b) unrelated to agreeableness, conscientiousness, and neuroticism.
Criterion: i. expatriate performance ii. adjustment iii. intention to leave the assignment early iv. not returning home early v. willingness to go on another expatriate assignment	**H11**: Inter-cultural openness will be significantly related to (i) - (v). **H12**: Cultural apprehension will be significantly related to (i) - (v). **H13**: Cross-cultural disinterest will be significantly related to (i) - (v).
Incremental	**H14**: The narrow-bandwidth expatriate personality measure will better predict (i) - (v).

7.2 Method

7.2.1 Participants. Participants were: (i) British employees who have been and returned from an expatriate assignment, and (ii) British employees currently on an expatriate assignment. The two groups were necessary to investigate all the expatriate outcome variables of interest in the study. All current expatriate assignments must be anticipated to last at least one year in duration or were anticipated to last a minimum of one year for expatriate assignments for those that have now ended. For those who had been on more than one assignment, they were asked to answer the questions in relation to their most recent assignment. Collecting data from expatriates is notoriously difficult (Aycan, 1997). Therefore, several recruitment strategies were employed. Samples were opportunistically obtained by cold calling multinational organisations, posting notices on expatriate web-forums (referred to as the widespread recruitment method by Nosek, Banaji, & Greenwald, 2002), as well as using personal contacts to disseminate information about the research i.e. snow-balling. Both employees and spouses/partners were approached and invited to take part, requiring their other half to also complete a questionnaire.

A methodological concern of using the internet to recruit participants is the potential for a biased sample (Barak, 1999), which could inaccurately represent the target population (Swoboda, Muehlberger, Weitkunat, & Schneeweiss, 1997) and in turn reduce generalisability of the findings (Nosek, et al., 2002). However, using the internet is particularly useful for accessing difficult samples (Nosek, et al., 2002), such as expatriates. Therefore, despite the potential limitation, the approach was used to maximise the potential to recruit large samples. Overall, 235 participants responded to the expatriate questionnaires, and 49 accompanying spouse/partner questionnaires. The total usable questionnaires were 91 current expatriate employees and 45 repatriated expatriate employees (age 19-77; genders: male = 102 (75%), female = 34 (25%), and 19 accompanying spouses/partners (age 28-56; genders: female = 15 (79%), male = 4 (21%).

This resulted in a total sample of 136 expatriate employees, and 19 expatriate-spouse/partner dyads.

7.2.2 Design, materials, and measures. An embedded mixed methods design (Creswell & Plano Clarke, 2007) was employed in the final phase of the research. The study was quantitatively dominant (Caracelli & Greene, 1997) with qualitative questions embedded within the questionnaire to provide a supportive, secondary role to the quantitative data (Creswell & Plano Clarke, 2007). Qualitative (open-ended) questions were included to focus on the most important factors highlighted during the qualitative study of phase one. The aim of this was to gather additional information on these factors that would compliment and support the previous results, as well as afford the opportunity for any other important or specific ideas to be collected. In an attempt to make the most from the data gathering process, collecting this additional data provided the potential for the results to be elaborated upon, which could in turn provide useful and important information to guide future research in the area. Greene, et al. (1989) referred to these as complimentary and expansion mixed methods study rationales.

Online questionnaires were accessible through emails that were sent to potential participants, which provided a link to the appropriate survey, or via a link placed within an Internet forum posting. Surveymonkey was used as it is a popular resource for online surveys and uses an encrypted system to protect participant data and ensure ethical responsibilities are upheld (http://www.surveymonkey.com).

The first page of the survey informed participants about the nature of the study and the specific participant requirements (e.g. must be British nationals). The page also contained information about participants' right to withdraw at any stage, assurance of anonymity of the responses participants provide, and by continuing with the questionnaire they are providing their informed consent to participate. General instructions were also provided on the first page of the questionnaire, including the estimated 20-minute duration time to complete the questionnaire. The last page of the questionnaire debriefed the participants about the study and provided the researcher's details in case they had any questions or concerns. Toward the end of the questionnaire, the option was given for employees to provide an email address for their accompanying spouse/partner so they could also be sent a questionnaire.

The questionnaire was designed to be used by employees (and spouses/partners) of all levels. Therefore, the wording was carefully chosen so that is was straightforward. The questionnaires were sent to five British employees (which included some social science researchers) to read and check the questionnaires for grammatical errors, understanding, and whether the questionnaires were working properly. Overall, the questionnaire comprised of various predictor variables, outcome variables, and open-ended questions necessary to answer the research questions. Demographic and general assignment questions were also included to provide background information about the sample. As repatriates and current expatriates were sampled (together with accompanying spouses/partners) the measures used were moderated accordingly to the group in question (e.g. repatriates would have their questions posed in the past tense).

7.2.2.1 Measures.

7.2.2.1.1 Demographic questions. All participants were asked to provide their age and gender at the time of completing the questionnaire.

7.2.2.1.2 Predictors variables

7.2.2.1.2.1 Personality (Expatriate and accompanying spouse/partner). Personality in all the expatriate populations was measured using the BFI (John & Srivastava, 1999). The BFI consists of 44 items measuring openness to experience, extraversion, conscientiousness, agreeableness, and neuroticism, and are measured on a 5-point Likert scale ranging from strongly disagree (1) to strongly agree (5) (see Chapter Six). Cronbach alpha values ranged from .63 to .89 for the scales.

The narrow-bandwidth personality instrument from study two comprises of three scales and is also measured on a 5-point Likert scale as above (see Chapter Six for scale details).

7.2.2.1.2.2 Family presence. Participants were asked to describe their family situation at the time of the assignment using a single-item containing seven categories: (i) had a partner/spouse and child(ren) accompany them abroad; (ii) had a partner/spouse and child(ren) that remained in the UK; (iii) had a partner/spouse accompany them abroad (no children); (iv) had a partner/spouse remained in the UK (no children); (v) had child(ren) accompany abroad (no partner/spouse); (vi) had child(ren) remain in UK (no partner/spouse); (vii) no partner/spouse or children. These categories were collapsed into whether family members accompanied the expatriated employee abroad (1) or remained in the UK (2) or employees had no partner/family. From the responses, 73 employees family accompanied them abroad, 25 employees had a family remain in the UK, and 33 employees who had no family or spouse/partner.

7.2.2.1.2.3 Language. Two questions were used to gather data for each of the language hypotheses. Firstly, participants were asked to respond to a dichotomous item asking whether or not the host country language was English-speaking ("yes" or "no") as used by Caliguiri et al. (2001). From the responses, 39 employees were posted to English-speaking countries and 94 were sent to non-English speaking countries. Participants were then asked to provide information regarding the fluency with which they could speak the host country language. This was measured using a moderated version of Shaffer et al.'s (1999) language fluency scale, which asked participants to rate "how well could you speak the language of the host country prior to the assignment?" An extra response item was added to the response scale to form a 5-point response scale (1= not at all, 3 = average, 5=fluent) to maintain consistency with the other measures used in the questionnaire.

7.2.2.1.2.4 Training. A single dichotomous item was used to collect data on whether or not training was received by the expatriates ("yes" or "no"). From the responses, 63 employees had received some form of training whilst 72 employees received none. If training had been received, participants were then asked to provide a rating on the perceived relevance of the training. To maintain brevity, a shortened version of Caliguiri and colleagues (2001) scale was used. Participants were asked to rate the importance of the information received during training in relation to the expatriate's job, the new culture, for the spouse/partner, overall performance, and overall experience. Participants are asked to rate each of the five items using a 5-point scale (1 = very unimportant to 5 = very important), in which an overall average score was calculated (Cronbach's alpha = .62).

7.2.2.1.2.5 Organisational support. This variable was measured using an existing POS scale developed specifically for expatriates by Kraimer and Wayne (2004). The scale consists of 14 items divided equally to measure perceived support in relation to finance (e.g. "the company took care of me financial"), career (e.g. "the company took an interest in my career"), and family (e.g. "the company showed an interest in my family's well-being"). Participants were asked to rate their organisations using a 5-point Likert scale (1 = not at all, 3 = to some extent, 5 = to a great extent). The lead-in sentence to the item was phrased in the appropriate tense according to whether the scale was being used in the repatriate questionnaire (i.e. "I felt like..") or the current expatriate questionnaire (e.g. "I feel like.."). Internal reliability for the scale were .89, .88, and .81, respectively.

7.2.2.1.2.6 Expectations. Expatriate expectations were measured using a previously developed scale by Caligiuri and colleagues (2001) as it was a short scale i.e. 3 items. Participants were asked to rate on a 5-point scale (1 = not at all, 3 = to some extent, 5 = to a very great extent) their expectations around various aspects of the expatriate assignment, including socialising (e.g. "To what extent did you expect socialising with host nationals would be difficult?"), culture (e.g. "To what extent did you expect the host country culture to be different from your country's culture?), and culture shock (e.g. "To what extent did you expect culture shock?"). An additional item was added to measure expectations about the expatriate's role (e.g. "To what extent did you expect your job role to be challenging?") as this is another important aspect of the assignment that was not accounted for in the scale's original form. Internal reliability of the scale was .62.

7.2.2.1.3 Outcome variables

7.2.2.1.3.1. Adjustment. This variable was measured using the existing 4-item scale of cross-cultural adjustment by Caliguiri (1997), which was adapted from the general adjustment scale of Black (1988). The scale frequently appears in the literature, and has had consistently high alpha values of above .80 (Caligiuri, 1997; 2000b). Also, as the scale contains only four items it helped keep the length of the questionnaire to a minimum. Expatriates were asked to rate, using a five-point scale (ranging from 1=poor, to 5=outstanding), their adjustment to: 1) the living conditions; 2) living in the country of their assignment, in general; 3) their expatriate experience; 4) the entertainment and leisure opportunities in the country. Ratings were averaged to derive an overall adjustment score, whereby a high score indicates a higher level of cross-cultural adjustment. For the repatriate questionnaire, items were changed to be retrospective as expatriates will have already been on the assignment and returned (i.e. "How well did you feel adjusted to..."). Cronbach's alpha for the combined expatriate employees was .73.

7.2.2.1.3.2. Early return or completion of assignment. Only the repatriated participants were able to provide information on whether or not assignments were completed or whether participants returned home early. In this case, a single item was used to ask whether or not the expatriate returned home early from the overseas assignment. Participants could respond with "yes", "no", or "no duration specified". If yes, participants were asked the reason for leaving to ascertain whether it was because they wanted to or because of organisational reasons. If no duration was specified and participants could not say they had returned home early, a moderated version of items used by Shaffer and Harrison (1998) were adopted to ask to what degree participants felt they had completed the task/time they were asked to finish. Participants were asked, "Do you feel like you had completed what you had gone out to do before returning home?" A "yes", "no", or "not applicable" response could have been given. Repatriates could be grouped into: 1) those who did not leave before they were meant to in terms of time or task; 2) those who had left early because of the organisation; and 3) those who had left early at their own request. In terms of statistical analysis, the number of participants did not meet a minimum count of 5 in each cell. Therefore, this variable was reverted to the simply dichotomy of whether or not participants had left the assignment early (1=no; 2=yes), noting that the reasons for leaving early could not be accounted for in the analyses. This means that higher scores on this scale showed someone who did leave before they should have. In total, 36 repatriates did not return home early and 8 repatriates did return home early.

7.2.2.1.3.3. Intention to terminate the assignment early. For current expatriate participants, the variable of intention to leave the assignment early was used in the questionnaire. The study used the 3 item measure used by Caliguiri's (1997). This included the item, "would you like to terminate this expatriate assignment early?" Participants were asked to rate their response using a 5-point scale (1= definitely not, 5= definitely yes). This means someone who scores highly on this scale is less likely to complete the assignment. Responses were averaged to provide an overall score for intention to complete the assignment (Cronbach's alpha = .80).

7.2.2.1.3.4 .Expatriate Performance. Self-rated performance is prone to potential biases such as leniency error (Meyer, 1980; 1998), halo error (Holzbach, 1978), and restriction of range (Thornton, 1980). It has been suggested that such potential biases could be reduced through methodological procedures (Latham & Wexley, 1994). In particular, the authors argued that self-evaluations that require relative judgments rather than absolute judgments yield better approximations of criterion measures based on the extent to which the reference group was clearly defined. This suggests that the accuracy of expatriate self-reports of performance could be increased by asking the individual to rate himself or herself relative to a clearly defined referent group. The present research used Caliguiri's (1997) expatriate performance items and moderated the measure to be consistent with Latham and Wexley's (1994) relative judgement recommendation. Both repatriate and current expatriate versions of the questionnaire contained the same items as they were applicable to both samples.

Expatriates were asked to rate themselves using a five-point scale (ranging from 1=poor or unsatisfactory, to 5=outstanding or exceptional) by recalling their last performance evaluation and comparing their performance to that of their peers in similar positions. Caliguiri's items covered overall performance (2 items: e.g. "your performance in general as an expatriate"), technical performance (1 item: "your technical performance on the expatriate assignment"), contextual performance (5 items: e.g. "your effectiveness at maintaining good working relationships with host nationals"), and expatriate-specific performance (5 items: e.g. "Your interpersonal relationship with host nationals, in general"). In Caliguiri's (1997) research, alpha values ranged between .63 and .67 for the scales. In the present research, alphas were improved to .75, .81, and .65, respectively.

7.2.2.1.3.5. Willingness to go on another assignment. A single-item was created asking participants to rate on a 5-point scale (1 = "definitely"; 3 = "Not Sure"; 5 = "Definitely Not") whether they "Would go on another assignment?". This means that someone who scores highly on this scale is less likely to go on another assignment.

7.2.3. Procedure. UK multinational organisations, or organisations that had a subsidiary in the UK, were located using organisation directories and web searches. Appropriate organisational stakeholders (e.g. global mobility managers, HR managers) were contacted and informed about the research. If access was granted, organisations provided either the contact email addresses of employees who met the specified participant requirements, or they would forward an email to these participants, which informed employees about the research and contained the questionnaire link. Simultaneously, expatriate forums were also identified and postings were made to inform and invite participants (expatriated/repatriated employees, accompanying spouses/partners) and organisations to take part in the research. Personal contacts were also used to disseminate information about the research and invite appropriate participants personally. Willing participants completed an online survey and any questions were dealt with by the researcher electronically. Where appropriate, participants were also asked to provide an email address for their accompanying partner/spouse in order to invite them to take part in the research. Emails were sent directly to these addresses, which included a specific link to a partner/spouse questionnaire. Data was collected between January 2009 until June 2010, and the datasets were retrieved from the online survey provider for analysis in June 2010.

8. Phase Three Results - Quantitative Results for Research Aim One

This chapter presents the results for the first research aim that attempt to empirically validate the important factors for expatriate assignment success in British expatriates.

8.1 Screening of the Data

After data was accurately imported, each variable was examined using univariate descriptive statistics to check for out-of-range numbers, implausible values for scale variables, and implausible means and standard deviations. Coding the missing data revealed that some items were missing because the participant had chosen not to provide the information. To examine the amount and pattern of missing data, MVA was carried out following the guidelines of Tabachnik and Fidell (2007). Results showed that no variables exceeded the recommended maximum 5 per cent amount of missing data. A statistically non-significant result was also shown from Little's Missing Completely At Random (MCAR) test, indicating that the missing data occurred completely at random: $\chi^2(108) = 99.74$; $p = .702$. Therefore, the missing data was not considered a problem and pairwise deletion of cases was used in subsequent analyses. The dataset comprised of repatriate and expatriate sample populations. Therefore, it was necessary to test whether it was appropriate to combine data collected from both groups for subsequent analyses. Statistical analyses were conducted to ascertain whether there were any significant differences between the two groups in the outcomes variables of interest (i.e. adjustment, performance, willingness to go on another assignment). Due to the unequal sample sizes in each group, Mann-Whitney U (non-parametric) tests were performed.

The results revealed no significant differences between the groups at the .05 level of probability[6], allowing data for these groups to be combined.

Various parametric assumptions were checked to ascertain which statistical test was appropriate to answer the research questions posed. These checks were carried out for each research question. For ungrouped data, this included checking: i) normality using skew and kurtosis values (±2; Ferguson & Cox, 1993; Garson, 2010); ii) outliers using boxplots and Leverage values (i.e. Leverage >.5; Garson, 2010); and iii) homoscedascity using biavriate scatterplots (as recommended by Field, 2007). In the present analyses, homoscedasticy could often not be assumed, possibly due to the relatively small sample size. Therefore, both parametric (Pearson's Correlations Coefficient (r)) and non-parametric (Kendall's tau (τ)) statistical tests were conducted and compared to see if there were any differences between to two. This particular non-parametric test was chosen because it is more suitable than the alternative test (Spearman's correlation coefficient) when sample sizes are small (Field, 2007). If differences in the results were found, the more conservative non-parametric test results were reported and interpreted. Following the recommendations by Field (2007), for the dichotomous outcome variable (early return) and the continuous predictor variables, point-biserial correlation coefficients (r_{pb}) were calculated to examine relationships.

For the grouped data, due to different numbers of participants in each group, the non-parametric Mann-Whitney U test was conducted to determine group differences with continuous outcome variables. For the dichotomous outcome variable early return

[6] Adjustment: U = 1900.50, z = -.69, *ns;* overall performance: U = 1978.50, z = -.35, *ns;* technical performance: U = 1855.00, z = -1.02, *ns*; contextual performance: U = 1848.00, z = -.93, *ns*; Go on another assignment: U = 1836.50, z = -.19, *ns*.

from the assignment, a Likelihood Ratio (LR) statistic was conducted due to the samples sizes being small (Field, 2007).

8.2 Main Analyses

The following analyses sought to examine the existence of relationships between certain predictor and outcomes variables, and whether specific groups differed from one another. Exploration of the relationships between all variables used in the study was not conducted. Instead, only the relevant relationships for each hypothesis were subjected to statistical analyses. This was to reduce the amount of errors or inaccurate results that can occur from multiple multivariate analyses (Field, 2009; Garson, 2010; Tabachnik & Fidell, 2007).

8.2.1 Hypothesis one. Hypothesis one explored the influence of personality on the various outcomes of expatriate assignment success. Descriptive statistics of the five personality traits and the continuous outcome variables were calculated and are presented in table 8.1.

Table 8.1

Descriptive statistics of personality trait scores, adjustment, performance (overall, technical, contextual, expatriate-specific), intention to remain on the assignment, and willingness to go on another assignment

Variable	n	Mean	SD	Skewness	Kurtosis
Openness	132	3.64	.46	.19	-.09
Agreeableness	132	3.90	.44	-.30	.29
Extraversion	132	3.65	.70	-.33	-.02
Neuroticism	132	2.24	.55	.90	-.27
Conscientiousness	132	3.99	.46	-.13	-.53
Adjustment	136	3.93	.55	-.43	.88
Performance (Overall)	136	4.00	.54	-.21	.46
Performance (Technical)	136	3.94	.64	-.12	-.05
Performance (Contextual)	136	3.89	.56	-.29	.01
Performance (Expatriate-specific)	91	3.53	.61	-.15	.46
Intention to leave the assignment early	91	1.82	.79	1.15	2.02
Willingness to go on another assignment	130	1.61	.76	.91	-.31

The analyses revealed that intention to remain on the assignment had the highest scores for skew and kurtosis, with kurtosis higher than the recommended value. Inspection of univariate outliers through a boxplot revealed cases 63 and 132 to be potential outliers that may be influencing the normality distribution. After removal, skew and kurtosis were brought down to within the acceptable limits of normality (i.e. skew = .53; kurtosis = -.56). Correlations are reported and displayed in tables 8.2 to examine the relationships between personality and outcome variables.

Table 8.2

Correlations between personality variables and continuous outcome variables (Pearson's r) and dichotomous outcome variable (point-biserial (r_{pb}))

Variable	A	P-O	P-T	P-C	P-ES	I	W	ER
Openness	.18*	.31**	.26**	.24**	.33	-.14	-.13	-.18
Agreeableness	.22*	.32**	.14	.35**	.26*	-.20	-.18*	.18
Extraversion	.28**	.27**	.22*	.30**	.18	-.27	-.27**	-.18
Neuroticism	-.34**	-.33**	-.32**	-.37**	-.30	.41**	.29**	.04
Conscientiousness	.24*	.29**	.37**	.26**	.25*	-.09	-.06	.02

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment. ER = Early return. * $p < .05$ (two-tailed). ** $p < .01$ (two-tailed).

Results suggest personality is related to expatriate assignment success with a number of significant and non-significant relationships between personality and the expatriate assignment outcomes. The results suggest that higher scores on openness, agreeableness, extraversion, and conscientiousness are related to higher scores on the outcome variables. Conversely, higher scores on neuroticism are related to lower scores on several of the outcome variables. Overall, hypothesis one (i) – (iii) and (v) was supported, hypothesis one (iv) was not supported.

8.2.2 Hypothesis two. Hypothesis two explored the influence of the expatriate's accompanying spouse's/partner's personality on the various outcomes of the expatriate assignment. Descriptive statistics of the accompanying spouse's/partner's personality trait scores were calculated and are presented in table 8.3.

Table 8.3

Descriptive statistics of accompanying spouse/partner personality trait scores

Variable	n	Mean	SD	Skewness	Kurtosis
Openness	19	3.52	.50	.21	2.02
Agreeableness	19	3.91	.39	-.63	-.31
Extraversion	19	3.40	.62	.67	-.11
Neuroticism	19	2.75	.62	.02	-.70
Conscientiousness	19	3.93	.42	-.68	1.31

From the analyses, only openness is marginally kurtotic. However, given the variable shows adequate skew and was based on a very small sample size, transformations or data deletion were not carried out. Slightly different patterns of relationships were found between the parametric and non-parametric tests. Therefore, the results of Kendall's tau (τ) are reported and shown in table 8.4.

Table 8.4

Correlations (Kendall's tau (τ)) between accompanying spouse/partner personality variables and continuous outcome variables

Variable	A	P-O	P-T	P-C	P-ES	I	W
Openness	.18	.17	.10	.16	.18	.14	.00
Agreeableness	.19	.11	.14	.14	.07	-.24	-.12
Extraversion	.06	.19	-.01	.05	.23	-.03	.02
Neuroticism	-.08	-.25	-.05	-.28	-.31	-.32	.27
Conscientious-ness	.13	.24	.21	.13	.35	-.28	.03

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment.

The results suggest that expatriate employee adjustment, overall performance, contextual performance and expatriate-specific performance is not significantly related to accompanying spouse/partner personality. Therefore, hypothesis two (i) to (iii) and (iv) was not supported.

Relationships between the accompanying spouse's/partner's personality traits and the early return outcome variable could not be examined because there were too few cases. Therefore, hypothesis two (iv) could not be tested.

8.2.3 Hypothesis three. The third hypothesis relates to family presence on the expatriate assignment. Whether or not the family accompanied the expatriate employee abroad had an impact on expatriate assignment outcomes was firstly examined with the continuous outcome variables and the results are displayed in table 8.5. Overall, the presence of the family made no significant impact on the expatriate assignment outcomes. As a result, hypothesis three (i) to (iii) and (v) was not supported.

Table 8.5

Mann-Whitney U tests between expatriates with and without accompanying families on the continuous outcome variables

	Mdn[7]					
Variable	*With Family*	*Without Family*	*U*	*z*	*p*	*r*
A	4.00	3.75	772.00	-1.16	*.25*	-.12
P-O	4.00	4.00	872.50	-.36	*.72*	-.04
P-T	4.00	4.00	778.50	-1.26	*.25*	-.13
P-C	4.00	3.80	793.00	.98	*.33*	-.10
P-ES	3.60	3.80	396.50	-.02	*.99*	.00
I	1.67	1.83	298.00	-1.01	*.29*	-.12
W	1.00	2.00	724.50	-1.50	*.14*	-.15

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment.

[7] The median for each group is reported instead of the mean as this is more appropriate for non-parametric tests (Field, 2007, p.550)

For early return from the assignment, the analysis revealed that participants whose family had remained in the UK were more likely to leave the assignment early compared to participants whose family accompanied them abroad (LR = 2.65). However, there was no significant difference found between these groups at the .05 level of probability ($p = .20$). Therefore, hypothesis three (iv) was not supported.

8.2.4 Hypothesis four. Hypothesis four relates to the language of the host country, and contained two parts: (a) whether or not an English-speaking host country relates to expatriate assignment outcomes; (b) whether the expatriate's host-country language fluency relates to the expatriate assignment outcomes.

Whether or not the host country was English-speaking had an impact on expatriate assignment outcomes was firstly examined with the continuous outcome variables (see table 8.6). Results of the Mann-Whitney U tests showed that adjustment for those who went to a host country that was English speaking (Mdn = 4.25) differed significantly from those went to a non-English speaking country (Mdn = 3.75), $U = 1364$, $z = -2.35$, $p < .05$, $r = -.20$. Expatriate-specific job performance between expatriates that went to an English-speaking host country (Mdn = 3.80) and expatriates that did not (Mdn = 3.40) was also found to be significantly different, $U = 507.50$, $z = -3.19$, $p \leq .001$, $r = -.34$. No significant differences were found for any of the other outcome variables. Therefore, hypothesis four (a) (ii) was supported, hypothesis four (a) (i) was partially supported, but hypothesis four (a) (i), (iii), and (v) was not supported.

Table 8.6

Mann-Whitney U tests between English-speaking and non-English speaking host countries on the continuous outcome variables

Variable	*Mdn* English speaking	*Mdn* Non-English speaking	*U*	*z*	*p*	*r*
A	4.25	3.75	1364.00	2.35	*.02**	-.20
P-O	4.00	4.00	1549.00	1.55	*.12*	-.13
P-T	4.00	4.00	1547.00	-1.62	*.12*	-.14
P-C	4.00	4.00	1686.00	-.73	*.47*	-.06
P-ES	3.80	3.40	507.70	-3.19	*.00***	-.34
I	1.67	1.67	802.50	-.36	*.73*	-.04
W	1.00	1.00	1587.00	-.77	*.45*	-.07

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment. *$p < .05$; ** $p \leq .001$.

For early return from the assignment, analyses revealed that there was no significant difference at the .05 level of probability between participants who went to an English-speaking host country and participants who did not (LR = .07, p = 1.00[8]). Therefore, hypothesis four (a) (iv) was not supported.

The descriptive statistics of the language fluency variable (n=133; mean = 2.55; st.dev = 1.60) revealed acceptable normality for analyses (skew = .56; kurtosis = -1.31). To explore the relationships between language fluency and the continuous outcome

[8] SPSS rounded figure up.

variables, Kendall's tau (τ) were conducted. Results showed that expatriates' language fluency is significantly related to adjustment (τ = .23), and expatriate-specific performance (τ = .37). The results suggest that higher levels of language fluency are related to higher levels of these assignment outcomes. Non-significant relationships emerged with the other outcome variables (P-O = -.02; P-T = .03; P-C = -.01; I = -.16; W = .01). Overall, hypothesis four (b) (ii) was supported, partial support was found for hypothesis four (b) (i), and hypothesis four (b) (iii) and (v) were not supported.

Examination of the relationship between language fluency and whether or not the employee returned home early revealed that participants with higher language fluency were less likely to have returned home early (r_{pb} = -.10). However, this was a non-significant correlation (p = .54). Hypothesis four (b) (iv) was not supported.

8.2.5 Hypothesis five. This hypothesis relates to the level of POS by the expatriated employee. Analyses were conducted on each POS dimension. The descriptive statistics of the POS dimensions are displayed in table 8.7.

Table 8.7

Descriptive statistics of perceived organisational support (POS) scores

Variable	n	Mean	SD	Skewness	Kurtosis
POS Financial	136	3.41	.83	-.06	-.42
POS Career	136	2.92	.88	-.11	-.79
POS Adjustment	136	3.02	.83	-.01	-.18

To explore the relationships between the POS variables and the continuous outcome variables, Kendall's tau (τ) are reported and displayed in table 8.8.

Table 8.8

Correlations (Kendall's tau (τ)) *between perceived organisational support (POS) variables and continuous outcome variables*

Variable	A	P-O	P-T	P-C	P-ES	I	W
POS Financial	.20**	-.01	.07	.09	.02	-.11	-.04
POS Career	.18**	.06	-.17	.17**	.51*	-.14	-.13
POS Adjustment	.23**	.07	.08	.11	.22**	-.10	-.03

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to remain on the assignment (current expatriate sample only). W = Willingness to go on another assignment. * $p < .05$. ** $p < .01$. *** $p < .001$.

Results show that all three dimensions of POS are significantly related to expatriate adjustment (financial, $\tau = .20$; career, $\tau = .18$; adjustment, $\tau = .23$). Overall performance and technical performance were not significantly related to POS. Contextual performance was found to be significantly related to POS career, $\tau = .17$. Significant relationships were found between expatriate-specific performance and POS career, $\tau = .17$, and POS adjustment, $\tau = .20$. Consequently, hypothesis five (ii) was supported; hypothesis five (i) had partial support; and hypothesis five (iii) and (v) were not supported.

On examination of the relationships between POS and whether the employee returned home early, only adjustment POS showed a positive significant relationship ($r_{pb} = .39$, $p < .01$). Therefore, hypothesis five (iv) received partial support.

8.2.6 Hypothesis six. Hypothesis six relates to expatriate training and contains two parts: (a) whether or not receiving training relates to expatriate assignment outcomes; and (b) whether the relevance of the training received relates to the expatriate assignment outcomes.

Whether or not receiving training had an impact on expatriate assignment outcomes was firstly examined with the continuous outcome variables (see table 8.9). Results of the Mann-Whitney U tests showed that receiving training made no difference to the assignment outcomes. Therefore, hypothesis six (a) (i) to (iii) and (v) were not supported.

Table 8.9

Mann-Whitney U tests between expatriates who received training and those who did not on the continuous outcome variables

	Mdn					
Variable	*Training*	*No Training*	*U*	*z*	*p*	*r*
A	4.00	3.88	1872.00	-1.77	*.08*	-.15
P-O	4.00	4.00	2081.50	-.91	*.37*	-.08
P-T	4.00	4.00	2222.50	-.23	*.83*	-.02
P-C	3.80	4.00	1842.50	-1.89	*.06*	-.16
P-ES	3.55	3.60	938.50	-.75	*.46*	-.08
I	1.67	2.00	949.50	-.32	*.76*	-.03
W	1.00	1.00	2054.00	-.21	*.85*	-.21

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment.

For early return from assignment, the analysis revealed that there was no significant difference between received training and returning home early at the .05 level of probability (LR = .71, p = .47). Thus, hypothesis six (a) (iv) was not supported.

For training relevance (n=64), descriptive statistics were explored and found appropriately for analyses (mean = 3.35; st.dev = .65; skew = -.30; kurtosis = .29). The conservative non-parametric test (τ) was conducted due to differences found between the results of the parametric and non-parametric test results. The results suggest no significant relationships with any of the outcome variables (A = .11; P-O = .02; P-T = .02; P-C = .11; P-ES = .12; I = -.03; W = -.18). Therefore, hypothesis six (b) (i) to (iii) and (iv) were not supported.

For the early return outcome variable, the analysis revealed a positive but non-significant relationship (r_{pb} = .27, p = .31). Therefore, hypothesis six (b) (iv) was not supported.

8.2.7 Hypothesis seven. Research question seven explored the relationship between the expatriate's expectations about the assignment with the various outcomes of expatriate assignment success. Descriptive statistics of the predictor variable (n=133) was calculated and were found to be acceptable for further analyses (mean = 3.09; st.dev = .68; skew = .30; kurtosis = -.16). To examine the relationships between the continuous predictor and outcomes variables, Pearson's Correlation Coefficients (r) were examined and are reported. Expectations were significantly related to adjustment (r = -.19) and expatriate-specific performance (r = -.36). This suggests higher expectations were related to lower levels of adjustment and expatriate-specific performance. Other relationships were not significant (P-O = .03; P-T = .03; P-C = -.03; I = .20; W = -.08). As a result, hypothesis seven (i) was partially supported; hypothesis seven (ii) was supported; and hypothesis seven (iii) and (v) were not supported.

Examination of the relationship between expectations and whether the employee returned home early revealed a negative non-significant relationship (r_{pb} = -.25, p = .11). Therefore, hypothesis seven (iv) was not supported.

8.3 Summary of Results for Research Aim One

Overall, mixed results were found to the hypotheses posed in the study. A summary of the results are presented in table 8.10.

Table 8.10

Summary of results and respective hypotheses for research aim one

Hypothesis	Outcomes	Supported
H1. Expatriate personality will be significantly relate to...	i. expatriate performance	Yes
	ii. adjustment	Yes
	iii. intention to leave the assignment early	Yes
	iv. not returning home early	No
	v. willingness to go on another expatriate assignment	Yes
H2. Accompanying expatriate spouse/partner personality will significantly relate to...	i.	No
	ii.	No
	iii.	No
	iv.	-
	v.	No
H3. Expatriate family presence will significantly relate to...	i.	No
	ii.	No
	iii.	No
	iv.	No
	v.	No
H4a. Whether or not the host country was an English-speaking country will significantly relate to...	i.	Partial
	ii.	Yes
	iii.	No
	iv.	No

cont. Table 8.10

	v.	No
H4b. The expatriate's language fluency will significantly relate to...	i.	Partial
	ii.	Yes
	iii.	No
	iv.	No
	v.	No
H5. POS will significantly relate to...	i.	Partial
	ii.	Yes
	iii.	No
	iv.	Partial
	v.	No
H6a. The presence of expatriate assignment training will significantly relate to...	i.	No
	ii.	No
	iii.	No
	iv.	No
	v.	No
H6b. The relevance of expatriate assignment training will significantly relate to...	i.	No
	ii.	No
	iii.	No
	iv.	No
	v.	No
H7. Expatriate expectations will significantly relate to...	i.	Partial
	ii.	Yes
	iii.	No
	iv.	No
	v.	No

9. Phase Three Results - Qualitative Results

9.1 Introduction

Qualitative questions were embedded within the questionnaire to gather additional information around the chosen factors from study 1 and highlight potential areas for future research. The results provide insight into participant views and positions regarding the factors, and attempt to provide additional information and explanations to the quantitative results found in Chapter 8.

Similar to study one, the purpose of the analysis was to break down the data collected into meaningful and manageable segments of information to answer the questions posed in the questionnaire. An inductive TA approach was chosen following the guidelines presented by Braun and Clarke (2006). TA was conducted on the responses for each qualitative question and the results will be presented with respect to the following factors derived from study 1: language, organisational support, training, expectations, and family issues. A final question was added asking respondents to state whether there is anything else that they think is important for organisations to consider. This was included specifically to capture any other issues that may have been missed in the previous questions, and highlight areas for future research.

Results are presented for the expatriated employees first and then for the partners. Quotations are used to illustrate examples of the themes, using the following formula: $S_{xy}.X_1$ where S_{xy} = sample population ($_x$ = expatriate employee (e) or accompanying partner or spouse (p); $_y$ = currently expatriated (c) or repatriated (r)); X_1 = participant number.

A limitation with open-ended questions within a questionnaire is that points cannot be explored or clarified if not understood. This is a limitation that must be accepted within the pragmatic design to collect the data. As the analysis approach is data-driven and inductive, attempts were made to appropriately interpret the data without attributing the researcher's own views. This included the results being checked by another researcher to ensure reliability. Also, when data could not be interpreted, responses were excluded from the analysis.

9.2 Employee Responses

This section presents the results of the TA on the employee responses to the questions. These questions are around the topics of language, organisational support, training, expectations, family issues and any other issues. Hierarchical TA structures are produced (see Appendix 5) and are discussed in sections 9.2.1 – 6.

9.2.1 Language. Two questions were asked in relation to language. The first questions related to whether or not participants felt that the host country language was a problem for them and why. The second question related to whether participants felt the organisation can/should do something to help with language issues.

9.2.1.1 Question One. In relation to whether the host language caused any difficulties or problems for the employees living and working in the host country, seventy-six currently expatriated employees and forty repatriated employees gave responses. After removing several unclear answers, responses could be coded into three main categories in terms of whether they felt language was a problem ("no", "yes" and "sometimes"). Then, responses within each of the respective positions were subjected to TA, providing information on the reasons why respondents felt the way they did and allowing the researcher to understand how and why the above quantitative results may be explained.

9.2.1.1.1 CATEGORY 1: No. The majority of responses indicated that expatriates did not have any problems or difficulties, and the reasons given could be grouped into two reasons: (1) English was mainly spoken in the host country; and (2) they could speak the host country language or had someone who could.

9.2.1.1.1.1 Theme 1: English mainly spoken. Overwhelmingly, the majority of respondents did not feel that they had any problems with the host country language because English was spoken there.

"English is widely spoken." (S_{ec}.4_1)

"Although the official language is not English. Very many people speak it." (S_{ec}.20_1)

Respondents also suggested that there were large expats communities in the host country, and therefore English was widely spoken.

"No, English is widely spoken, there is a large expat community." (S_{ec}.15_1)

9.2.1.1.1.2 Theme 2: Spoke host country language. The second main reason why respondents did not have difficulties or problems with the host country language was because they could speak the host language:

"No problem as language level enabled me to conduct business effectively" (S_{ec}.16_1)

Alternatively, expatriates had someone close to them who could speak the host country language, which helped overcome language problems or difficulties:

"No, as my wife is from the host nation!" (S_{ec}.11_1)

Some respondents enjoyed the challenge of learning a new language and felt it enriched their experience:

"No, it is not a problem, it is a challenge that I enjoy and which adds to the whole experience. It is a pleasure to be able to communicate in a different language" (S_{ec}.21_1)

9.2.1.1.2 CATEGORY 2: Yes. A number of respondents felt that the host country language did create problems and difficulties for them. Creating clear and distinct themes was difficult due to the small number of responses. Therefore, a general theme to encompass the responses was chosen.

9.2.1.1.2.1 Theme 1: Challenging communication. The responses covered a variety of lifestyle and family challenges that they faced with respect to the host language. Typically, respondents felt the host country language created difficulties in communicating.

"Yes, particularly in the workplace with technical language and abbreviations." (S_{er}.15_1)

Even though English can be used to live, some respondents felt embarrassed speaking in English and not being able to speak the native language:

"not being able to converse in Arabic was embarrassing and I believe it is always better to make an effort to learn the basics." (S_{er}.25_1)

"Yes for living as it is often embarrassing asking for things in English all the time" (S_{ec}.47_1)

Respondents also felt that their families had difficulties with the host language:

"My partner possibly had greater difficulties as he does not speak the language." (S_{er}.23_1)

Some respondents also felt that language was an issue even though the host country (e.g. the US) language was English:

"UK / US is in most ways very easy. However, the mere fact that there is commonality also brings much greater scope for causing offence" (S_{ec}.31_1)

"Yes. It is easy to get by without speaking the language, because English is understood. But you can only reach a certain plateau and it gets very frustrating beyond this." (S_{ec}.35_1)

Some respondents felt that confidence to speak the host language was an issue, which they felt was a problem on the assignment:

"Yes. Although I know understand a lot of what is said to me, I don't have the confidence to reply – or simply don't have the ability. It can be quite isolating" (S_{ec}.59_1)

9.2.1.1.3 CATEGORY 3: Sometimes. Finally, there were numerous respondents who felt language was an issue in certain contexts or times.

9.2.1.1.3.1 Theme 1: Outside work issues. Some respondents felt that language was sometimes was an issue outside of work but not in work:

"Luckily most India's can speak English but when stepping out of the working environment it was sometimes difficult to do normal tasks, ie. Shopping." (S_{er}.34_1)

9.2.1.1.3.2 Theme 2: Inside work issues. Other respondents found the opposite to the above theme, that inside work there were more language difficulties than outside of work:

"Living no – working yes. I do not perform at the same level as I would in the UK because of lack of language." (S_{ec}.12_1)

9.2.1.1.3.3 Theme 3: Time. This was another element raised, whereby at first language is an issue but after a while language competence is gained:

"It gets easier with time but it isn't easy until you are fluent." ($S_{ec}.55_1$)

"Yes. I do not have the time to learn the language – while trying to balance and enjoy my outside life (as well as work life). I find this very difficult and wish my language skills were much better" ($S_{ec}.53_1$)

The second quote above highlighted the importance of having enough time to learn the language, which can be difficult in itself.

"Initially it was very difficult – living, breathing in another language 24hrs a day is tiring especially when you are adapting to a new job and culture" ($S_{ec}.26_1$)

9.2.1.2 Question Two. In relation to whether the organisation could or should do anything to help with potential language issues, eighty-four currently expatriated employee participants and thirty-six repatriated employee participants responded to the question. One response was unclear and therefore was excluded from the analysis. Overall, most respondents felt organisations could do something to help with language issues and a minority did not think anything could be done. Of the respondents that felt something could be done there was one main theme of responses. This theme related to the provision of training.

9.2.1.2.1 THEME 1: Training. Almost all of the respondents suggested and explained that what organisations could or should do to help with language issues was provide training:

"Offer intensive language course" ($S_{ec}.75_1$)

Many respondents stated that they thought training should also be made available for partners and family members:

"Make language training (in various forms) available for employee and any accompanying partner/children" (S_{ec}.65_1)

Training was suggested as important both prior to the assignment:

"As much pre-travel language training (at the appropriate level) as possible!" (S_{er}.21_1)

"Provide (voluntary) language training for employee and family PRIOR to departure" (S_{er}.12_1)

As well as during the assignment:

"More assistance and lessons prior to going on assignment where another language is necessary, as well as continued lessons whilst on assignment. I had only a few lessons prior to coming on assignment and it took a long time once here to learn the language to a reasonable level. Colleagues from another country that came to the same host country as me had spent several days a week for two months to learn the language and were so able to integrate in the workplace much quicker.." (S_{ec}.66_1)

This helps provide support and build more confidence in the employee:

"Tuition 4 months prior will be as productive as the first month immersed in the language, but important all the same from a confidence perspective." (S_{ec}.10_1)

9.2.2 Support. Within the topic of organisational support, forty-eight current expatriated employees and fourteen repatriated employees responded to the question. Six responses were removed as they were unclear or stated that the POS scale covered the support. The remaining responses were analysed and five main themes were developed. One related to the provision of training, which has already been discussed. Therefore, the remaining four main themes are discussed in this section (Section 9.2.2.1 - 4)

9.2.2.1 THEME 1: Information and advice. Within this theme, respondents felt that provision of information, relocation advice, and details of the assignment was important. This information and advice related to various aspects of the expatriate life (e.g. housing, finance, schools) and respondents felt it would allow them to have a better understanding of what to expect.

"More information re the cost of living, more info re how to make the family settle in, sports clubs, expat networks, etc..." ($S_{er}.11_1$)

"Increased knowledge of the limitations of the medical insurance cover." ($S_{ec}.21_1$)

This information particularly related to the initial set-up within the host country.

"More help with finding accommodation, more time to find and buy a car (3 weeks car rental allowance is not enough) and more help finding a suitable school for my children." ($S_{ec}.13_1$)

9.2.2.2 THEME 2: Local contact. The next main area that respondents felt could provide more support was with a local contact provided for expatriates and their families. For example, respondents felt having someone there to meet them once they had arrived would be helpful in making the expatriate and family feel welcome:

"Having a person assigned to me to help with transition was very helpful but would have liked to have been introduced to more ex pats just on initial phase especially as I am single and on this assignment alone." ($S_{ec}.17_1$)

"general assistance on relocating and some person to help with questions once landed" ($S_{ec}.22_1$)

A mentor was also mentioned as a useful source of support when on the assignment:

"Senior mentor at host company." ($S_{ec}.36_1$)

9.2.2.3 THEME 3: Family. More family support was the next most frequently advocated area where support should be given. This included support for partner employment issues and socially interacting:

"Assistance with helping the family interact socially." (S_{ec}.4_1)

Suggestions were also made for other family contacts and organisations helping to build social networks for expatriated families:

"Each expat family should be asked to shadow an incoming expat family both from before to during the assignment." (S_{ec}.38_1)

9.2.2.4 THEME 4: Communication with UK. Respondents highlighted the importance of maintaining regular contact and communication with the home country organisation so they do not lose touch with what is happening back home and what will happen when they return:

"There has been only limited contact and support from my home company about development and career opportunity after the assignment. Coming towards the end of an assignment and having no security about what will be happening is very unnerving and distracting." (S_{ec}.37_1)

As the above respondent highlighted, not knowing what will happen can create negative feelings with the employee.

"The phrase out of sight out of mind is very apt...I had a distinct feeling of abandonment from my home country." (S_{er}.8_1)

9.2.3 Training. Within the area of training, participants were asked if they thought training was important and want what kind of training they felt should be offered by organisations. Thirty-eight repatriated employees and eighty currently expatriated employees responded to the question. Of these, eight responses could not be coded or understood and were removed from the analyses. Overall, the majority of participants thought training was important, whereas some thought it was not important, or it depended on certain factors. Within each of these three views, answers could be further explored into sub-themes (as in section 9.2.1), which provided additional information or reasons for the respondents view. Each category and incumbent psychological themes are presented below.

9.2.3.1 CATEGORY 1: Yes. As highlighted above, most respondents felt training was important. Respondent felt training helped prepare for the move and help ensure a positive experience, as describe by the respondent below:

"To ensure problems are anticipated and dealt with and to ensure the expat can do their job as effectively as possible and have a good experience" (S_{ec}.19_1)

Within these responses, three main groups of training were advocated as beneficial and important: (1) language; (2) culture and (3) job training.

9.2.3.1.1 Theme 1: Culture training. The most important type of training respondents felt should be offered to employees is culture training. Respondents felt it was important to be aware of the cultural differences to help prepare for the relocation.

"The cultural aspects of living abroad cannot be underestimated, It needs an awareness before starting and a refresher during the assignment so that the experiences can be related to the training." (S_{ec}.66_1)

Cultural training is considered important to enhance understanding that facilitates living and working in a different country:

"Understanding Culture in host country is important. Helps on many levels – interaction with people, development of staff" ($S_{ec}.49_1$)

Respondents also thought that it was important to include the expatriate's family in this training to help with family's understanding and integration:

"Cultural training for family should be compulsory." ($S_{ec}.72_1$)

Cultural training would include information around everyday living, such as practical issues, such as housing, driving, and financial issues.

"Driving training: adjustment to LHD and local driving rules for spouse and employee" ($S_{ec}.68_1$)

9.2.3.1.2 Theme 2: Language training. The second highly advocated type of training was host country language training. Participants felt it was very important for organisations to provide training on the host-country language:

"Intensive language training should be mandatory to get the expat to a certain standard before they start their assignment." ($S_{ec}.62_1$)

The importance of language training prior to leaving for the assignment is highlighted in the above quote. Many participants highlighted the importance of comprehensive language training, but also acknowledge that at a minimum, being able to speak basic phrases would be useful:

"I think language training is important in order to be able to do simple things like order food etc." ($S_{ec}.61_1$)

Respondents felt speaking the language was important for establishing respect from colleagues and to help them integrate into the new culture:

"Pressure to perform or attain conversational level. Gain respect from host country colleagues and help integration." *(S_{ec}.33_1)*

Language training was seen as important for the employee's family/partner as they also need to integrate into the new culture.

9.2.3.1.3 Theme 3: Job-related training. The final type of training advocated was job-related training. Participants felt it is important to know what is expected of them in their new role and how business is conducted in the country. Knowing this, and being trained on the job and organisational specific issues, in turn will help the employee perform better and be more successful:

"I feel that the training which was lacking was in the area of people management. I have to manage a team of host nationals but I was not trained on the specifics of the host personnel management and development. I found it difficult to manage staff without a more thorough knowledge of the host country's salary scales/grades and career management procedures." (S_{ec}.15_1)

"I think a business unit induction would have been very valuable (I did not get one!)" (S_{ec}.65_1)

9.2.3.2 CATEGORY 2: No. For those who felt training was not appropriate, three main reasons were given: (1) not necessary; (2) cannot train for; (3) down to the person.

9.2.3.2.1 Theme 1: Not necessary. Of the respondents who felt training was not necessary, this was mainly due to their individual circumstances. This included the fact they these employees were already experienced or familiar with the host culture or they were going to be in a similar role and therefore needed no training:

"After 15 years of expatriation I really didn't need or expect training" (S_{er}.17_1)

"Training was related to my new job. If I was moving to a similar post training would not have been required" (S_{er}.15_1)

9.2.3.2.2 Theme 2: Cannot train for. Some respondents felt that being an expatriate is not something that can be trained for as it is an experience :

"Expatriation is an experience you cannot learn from a classroom." *(S_{ec}.4_1)*

9.2.3.2.3 Theme 3: Down to the person. The final reason for training being unimportant is because the most crucial factor is the individual, and the organisation should only being using and selecting employees that are suitable. Therefore, training is not as important as this:

"I believe prior to consideration for expatriation a person should be competent in his field and only need to adapt to the differences provoked by the change in" (S_{ec}.12_1)

"Any organisation should select personnel for overseas assignments based primarily on their ability to relate to and work with foreign nationals. No amount of training can influence a persons natural ability in this field." (S_{ec}.43_1)

9.2.3.3 CATEGORY 3: Depends. Lastly, some respondents felt that the importance of training depended on one factor:

9.2.3.3.1 Theme 1: Relevance. Respondents highlighted that the importance of training was dependent on it relevancy. This relevance was based on the need of the individual and the position:

"Depends on the position and the experience of the individual." (S_{er}.17_1)

9.2.4 Expectations. Two questions were asked in relation to expectations. The first question related to whether or not participants felt that expectations influenced the success of the assignment and why, and the second question related to whether participants feel the organisation can do anything to help manage expectations.

9.2.4.1 Question One. Thirty-six responses were provided by repatriated employees and sixty-nine by current expatriates. Of these, five could not be understood or answered the question and were removed from the analyses. The remaining responses were divided between those that felt expectations did influence the success of the assignment (Section 9.2.4.1.1) and those that felt expectations did not influence the assignment (Section 9.2.4.1.2). Further analysis of the information provided by respondents within each respective position provided sub-themes of reasons for their views.

9.2.4.1.1 THEME 1: No influence. A slightly larger proportion of respondents felt that having expectations did not influence the success of the assignment, which could be grouped into three main themes or reasons: (1) expectations are never met; (2) more important to be open; and (3) had no expectations.

9.2.4.1.1.1 Sub-Theme 1: Expectations not met. Many respondents felt that expectations did not influence the success of the assignment because expectations were not met anyway:

"I don't think having expectations influenced the success of the assignment as the reality was so different from any expectations." ($S_{er}.7_1$)

Expectations can even be wrong, which is not a good thing:

"Must be careful to judge everyone as an individual when you arrive and not stereotype people based on nationality." ($S_{ec}.59_1$)

Some respondents also had mixed experiences where inside of work, expectations were met, but outside of work their expectations were not met:

"No because the work content was multi-cultural as expected whereas life outside work was more difficult" ($S_{er}.11_1$)

Overall, respondent viewed that expectations did not influence the outcome of the assignment because they were not as expected.

9.2.4.1.1.2 Sub-Theme 2: More important to be open. The second main theme within the reasons why expectations did not influence the outcome of the assignment was because participants felt it was more important to be open and flexible and not have expectations:

"one should go with a fairly open mind and not with (possibly biased) opinions of others" ($S_{er}.15_1$)

It is down to the individual to adapt and not having expectations is better:

"no, in my opinion you need to be open minded and go with the flow" ($S_{ec}.67_1$)

9.2.4.1.1.3 Sub-Theme 3: Had no expectations. The final group of reasons why respondents felt that expectations did not influence the success of the assignment was because they had no expectations:

"I did not really have expectations of my new position before leaving the Uk other than it was a similar position to that which I had held there." ($S_{ec}.38_1$)

"I took it as it came – expectations are never correct and often lead to fear." ($S_{er}.28_1$)

The above quote highlighted that some respondents felt that having expectations could even be negative. Therefore, it is better not to have them.

9.2.4.1.2 THEME 2: Yes influenced. Respondents that felt expectations did influence the success of the assignment gave reasons that could be grouped within two main themes: (1) Help prepare; and (2) Give confidence.

9.2.4.1.2.1 Sub-Theme 1: Help prepare. Many of the respondents felt that having expectations helped the success of the expatriate assignment because it helped the employees prepare and plan for the assignment:

"I wanted to think through the worst case scenarios and have a plan so I did not feel disappointed or isolated." (S_{ec}.45_1)

"Yes, knowing what you are coming too, should always help with setting expectations" (S_{ec}.48_1)

"Expectations of differences prepared me better for inevitable culture shock" (S_{ec}.69_1)

9.2.4.1.2.2 Sub-Theme 2: Give confidence. The second theme is related to the first, which was that having expectations was said to help respondents feel more confident and aware of what was going to happen:

"Yes. I was confident about going to live in another country and I was prepared." (S_{er}.10_1)

9.2.4.2 Question Two. In relation to whether the organisation can do anything to help manage expectations, sixty currently expatriated employees and thirty-four repatriated employees gave responses. After removing several unclear answers, responses could be coded into those that thought the organisation could do certain things to help manage expectations (Section 9.2.4.2.1), and those that could not (Section 9.2.4.2.2).

9.2.4.2.1 THEME 1: Organisations can help manage expectations. The majority of responses thought that organisations could so something to help, with three main themes representing the responses: (1) provide more information; (2) more contacts and communication; and (3) pre-assignment visits.

9.2.4.2.1.1 Sub-Theme 1: Provide more information. The most advocated way in which respondents felt the organisation could help manage expectations is through providing more information about the assignment. This information included areas such as the host county culture, the role, and the purpose of the assignment.

"In my case it was the work responsibilities and (regulatory) environment that I would have benefited from greater knowledge." (S_{ec}.37_1)

"More examples of previous assignments, lessons learnt, good and bad feedback, might be helpful" (S_{ec}.27_1)

"More information about the host country and what it is like to live and work there." (S_{er}.27_1)

Providing information on these was considered important in order to help prepare the employee. It was also noted that information should be up to date if it is to be useful for the employee.

"We had a 30 page introduction which helped. Except the fact it was 3 years out of date." (S_{ec}.35_1)

This included providing more training, which should include the family (as discussed in Section 9.2.1.2.3)

"Better training for the cultural differences, particularly for spouses" (S_{ec}.5_1)

Being honest was another factor that respondents felt would be useful, as highlighted in the below quote:

"Be honest when someone is going on assignment, let them know if there job is safe or not especially in the current climate." ($S_{er}.1_1$)

9.2.4.2.1.2 Sub-Theme 2: More contacts and communication. The second most advocated way in which organisations could help manage expectations is through more communication. This included with the home organisation:

"Regular communication with mother ship" ($S_{ec}.3_1$)

As well as with a host-country contact before the employee leaves:

"A designated contact in-Country to talk to before you leave." ($S_{er}.19_1$)

"Yes, we should provide a level of communication with those companies with whom we will work prior to the move, in that way we would have a feel for how they operate prior to arriving." ($S_{er}.31_1$)

Respondents felt that meeting up with current expatriates and other expatriated families would be beneficial and help take advantage of knowledge and experiences of these individuals who have already experienced living in a different country:

"They should use the people who have been to the given country / assignment in the past more effectively to pass on knowledge to new expats. This would facilitate and take some stress out of the move" ($S_{ec}.2_1$)

9.2.4.2.1.3 Sub-Theme 3: Pre-assignment visit. The final way in which respondents felt that organisations could help manage expatriate expectations is through visits or trials in the host-country:

"I think a test week or period of being in the country and organization to get some pre-assignment experience of what to expect would be very helpful." *(S_{ec}52$_1$)*

Many respondents also felt that the family should also be included in the visit to help manage their expectations:

"A "look see" is a good idea which enable you and your spouse to visit the country before you go and see the offices you will be in and the types of accommodation you will be residing in" *(S_{er}20$_1$)*

9.2.4.2.2 THEME 2: Organisations cannot help manage expectations. Several respondents stated that they did not think anything could be done by the organisation to manage expectations. Of the respondents that gave answers, they related primarily to the fact that they felt assignments and the employees were too specific and individual to account for:

"Not sure how a organisation could this as expectations are very individual and based on that individuals culture, education & knowledge of the host country." *(S_{ec}41$_1$)*

9.2.5 Family Issues Whether employees had families that remained in the UK or accompanied them abroad, each were asked whether there were any issues relating to this family set-up that the organisation should consider. Responses were broken down into the respective family set-up and analysed separately in order to preserve as differences that may emerge from the two living situations.

9.2.5.1 Remained in UK. For participants whose family or some family members remained in the UK, twenty-two currently expatriated employee participants provided responses, of which, six could not be analysed. Eighteen repatriated employee participants provided responses to this question. However, six were unclear or insufficient to include in the analyses. These were removed and from the remaining responses, the majority related to providing more allowances.

9.2.5.1.1 Theme 1: More allowances. Overall, the majority of respondents suggested that providing more flights for family trips would be advantageous to help overcome the difficulty of being separated from family members:

"Expat flights. Shouldn't be restricted to just one per month." *(S_{ec}.19_1)*

"It is tiring and quite hard to be separated and to have to travel home to see a family. Companies must be generous and understanding on costs here." *(S_{ec}.4_1)*

Emphasis was placed on the allowances being available for both partners:

"Ensuring that flight budgets for home visits can be used by partner to visit me instead of a home visit and covering associated costs e.g. airport parking." *(S_{ec}.16_1)*

Also, respondents felt that more holidays should be allowed in order for more visits:

"Ensure that there is adequate flexibility to allow you to return home on a frequent basis and at a reasonable time" *(S_{er}.8_1)*

Finally, a number of responses suggested that organisations should help or ensure that facilities are in place to help with communication back home:

"The importance of internet access in your place of residence, (seeing the kids and them seeing you on webcam). Some expats went for long periods without this facility." *(S_{er}.16_1)*

9.2.5.2 Family relocated. For participants whose family or some family members relocated, fifty-three currently expatriated employee participants and twenty-six repatriated employee participants provided responses to this question. Ten responses were unclear or did not answer the question. These were removed from further analysis. From the remaining responses, five respondents did not think the organisation should consider any other issues relating to the family. However, the majority of responses felt that some consideration of various issues were important. From the analysis, these issues could be grouped into four main themes.

9.2.5.2.1 Theme 1: Child issues. The first main issue highlighted from respondents related to the importance of considering expatriate's children and the provision of appropriate childcare and facilities:

"We had children whilst on assignment and felt the needs were ignored compared to having children at despatch to host nation" ($S_{ec}.9_1$)

Schooling was the main area of concern for respondents and they felt it was important that organisations help find and finance quality schooling for their children who had relocated:

"Schooling needs to be considered." ($S_{er}.21_1$)

"Of course. Most importantly, the education of the children must be completely adequately provided for." ($S_{ec}.17_1$)

This issue included providing enough time to find and settle into schools:

"As much time as is possible should be given to resolving schooling places. Many business hubs will have schools with waiting lists. Education is a high stress part of a relocation if not handled correctly" ($S_{ec}.2_1$)

Children that were not of school age were also highlighted as important to consider:

"Adult children (18+) are not considered when overseas." ($S_{ec}.6_1$)

9.2.5.2.2 Theme 2: Partner/Spouse issues. The next most frequently cited issue that organisations should consider is the accompanying spouse or partner of the expatriate:

"Often a spouse has to give up a full time job to accompany their partner. Companies often overlook this sacrifice." (S_{ec}.36_1)

"I think the organization has to be aware that if the partner is giving up a job/career to move for the other partner this is a big change in their life, not only financially but emotionally also." (S_{ec}.39_1)

Employment and networking is important as the spouse or partner can be giving up a career, and therefore need to integrate and have things to do to occupy their time:

"When your spouse is happy on an expat assignment, you are generally also happy. It is that important. It certainly assists if there are other expat families/couples out there to mix with." (S_{er}.14_1)

9.2.5.2.3 Theme 3: Prior information and support. The next most popular issue raised by respondents was the provision of information and support in general. This centred around the provision of medical care:

"Fully inclusive proven medical insurance" (S_{ec}.30_1)

"The full social fabric. Schools, doctors, hospitals, etc. can be assumed as being in place when they may not... These are essential if families accompany the assignee." (S_{ec}.31_1)

Also helping with finding and providing housing:

"accommodation. Particularly when you have children. Having the right place to live is essential in being happy" (S_{ec}.51_1)

"No guidance given in terms of recommended areas to live or schools, all that was left to my local knowledge and internet searches." (S_{er}.24_1)

Providing general information on the host country and culture was also highlighted by some respondents. This included training and support for integration and other general living issues for the family:

"School information, general orientation, language training, general information on legal basic, transport, health care system, everyday life" (S_{er}*.12*$_1$)

9.2.5.2.4 Theme 4: Time. The final theme that several respondents mentioned was having enough time to prepare and settle in to the new country:

"The time it takes to prepare for the move. The importance of making sure the whole family transition well. If partner and family are not okay the expat will not be effective and high performing in most cases." (S_{ec}*.28*$_1$)

"Finding schools was a challenge. Settling kids in is always tough but the lead in time to an assignment has to be long enough to find the best fit for schools and houses." (S_{ec}*.41*$_1$)

9.2.6 Other Issues. The final open-ended question participants were asked related to whether there were any other issues that expatriates felt were important for the organisation to be aware of when sending employees (and their families) overseas. Forty-five currently expatriated employee participants and twenty-one repatriated employee participants responded to this question. One response could not be understood and was removed from the analyses. From the remaining analyses, four respondents did not feel that there were any other issues. The remaining responses covered a wide range of issues. Many of which included some of the areas already discussed, such as the importance of considering the family, having contacts, providing assistance, support, providing information, training, and planning appropriately. These are therefore not discussed in this section. However, several different issues were emphasised in the responses that have not been discussed so far from the analyses. In order of prevalence, these issues were: (1) budgets and allowances; (2) repatriation; (3) single employees; and (4) assessment.

9.2.6.1 THEME 1: Budgets and allowance. The most frequently highlighted area for organisations to consider related in financial aspects of being posted abroad. In particular, this included exchange rates that many respondents did not feel are appropriately accounted for when being paid:

"The exchange rate policy is very poor at catering for the fluctuations of the income. We experienced a drop of around 25% on net income after international transfer between the start of the placement and the end of the first year. We received an equivalent of 10% as a one-off payment." (S_{ec}.44_1)

"Inflation and cost of living increases / FX change need to be calculated on a yearly basis." (S_{ec}.7_1)

Participants thought more flexibility with allowances would be better to accommodate for different circumstances:

"Flexibility in the packages is key. This ensures that the support and benefits are best allocated to the greatest impact e.g. one expat may not use the full housing allowance but may need more for something else so offering flexibility around this will help when everyone's circumstances can vary." (S_{ec}.21_1)

Several respondents also felt that having bigger expense allowances should be considered to cover costs associated with the move:

"Need to have somebody in the company who takes a lot of the admin activities associated with the move off your hands, e.g. filling out forms, planning the timelines for the move such as packing, shipment, booking hotels and flights." (S_{ec}.18_1)

"Ensuring budget allowances take into account the full picture – the cost of living, the family needs, the location of the office and schools, the amount of time they will spend their e.g. the needs of a family living full time are quite different to a those of a single person commuting. Standard data does not necessarily reflect the full details of the type of accommodation i.e. it may look ok on paper but in reality the budget does not cover a good standard of accommodation taking into account commuting etc." ($S_{er}.9_1$)

Also, terms within contracts that may relate to allowances should not be changed during the assignment. They should be complied with:

"Changing the rules after terms of the assignment have been agreed is extremely de-motivating" ($S_{ec}.28_1$)

9.2.6.2 THEME 2: Repatriation. The next commonly cited issue that should be considered is what is going to happen after the assignment:

"The return to the UK can be difficult, for the employee and his family. I struggled to adjust to UK life again, but had no support in place for this." ($S_{er}.17_1$)

Respondents felt it was important for organisations to consider the repatriation process as important as the expatriation process:

"Integration back to the home country should be given as much importance as the original assignment" ($S_{ec}.29_1$)

Consideration of career issues and providing general support is advocated by respondents:

"Career planning for the end of the assignment and sufficient support transferring home or to next location" ($S_{ec}.19_1$)

9.2.6.3 THEME 3: Single employees. The next issue that was raised related to single employees and the importance of considering their circumstances and needs:

"When single, it is very difficult when you arrive to find a house, buy a car, organize life and do the job – you need to be superman. The traditional expectation is that it is a male expat with a wife to look after all of the personal set up. If you are a single female this is not so easy." (S_{er}.6_1)

"Being single and having no children can initially be lonely. Your colleagues have their own lives. But it does not mean we have no ties and therefore can move at a moments notice" (S_{ec}.16_1)

It was also suggested that consideration is warranted for the fact that these employees may not return home:

"single people posted abroad may not come back!" (S_{er}.21_1)

9.2.6.4 THEME 4: Assessment. The final issue that respondents highlighted as something that organisations should consider is assessing expatriates to ensure their suitability for the assignment:

"The need to run a character assessment on the individuals. Some people are cut out for an international role, others are not, regardless of their track record. The best performers do not always make the best expats, in fact they invariably don't make the best expats." (S_{er}.2_1)

This includes assessing the family as they can have issues and consequences that are made worse when abroad:

"Ensure mental fitness. If someone is an alcoholic depressive in the UK then it will be a 1000 times worse than had they stayed at home. Ensure clear accurate realities exist of working patterns as it may include 12 hour days and 6 days working so husband does not get to see wife or kids Ensure that any accompanying families are mentally fit. Unhappy housewives end up shagging the tennis coach at the club and then everything goes wrong. Alcoholic wives are a particular problem. If employee has one then single status only." (S_{ec}22$_1$)

Also, check-up assessments should be done to ensure no health issues have occurred since being posted on the assignment:

"A quarterly sanity check to ensure employee and family do not have any major issues" (S_{ec}3$_1$)

9.3 Accompanying Spouse/Partner Responses

This section presents the results of the TA on the accompanying spouse/partner responses. Accompanying spouses/partners were asked two open-ended questions. The first question relates to whether they think there are any important issues relating to themselves or their family that organisations should consider, and secondly, whether there are any other issues in general that they think should be considered by the organisation. Each question is discussed separately below and a summary of the TA results for both questions is presented in Appendix 6.

9.3.1 Family issues from accompanying spouse/partner perspective. Twenty respondents answered this question (ten currently expatriated spouses/partners; ten repatriated expatriated spouses/partners). From these, three responses highlighted that nothing needed to be considered. The remaining responses highlighted that whole family support was important:

"A transfer is for the whole family - not just the partner who is working. The support needs to run through and the whole family needs to feel as though they are supported." *(S_{er}.2_1)*

This family support was centred on three main issues: (1) children; (2) networks and socialising; and (3) appreciating cultural differences and difficulties.

9.3.1.1 THEME 1: Children. The main emphasis was the importance of providing help with schooling, which has benefits not only for the children but for the trailing-spouse/partner as well:

"Help with Schooling" (S_{er}.7_1)

"schooling: schools offer education and a base for socialising for children and their parents: it can be the lifeline for the partner at home with the children" (S_{ec}.10_1)

Another area highlighted by two respondents was the importance of understanding and providing more help when children have disabilities or special requirements:

"children with special educational/ additional needs/ disabilities - currently there is no 'passport' statement, and children who move frequently, especially between countries, often end up at the bottom of both nhs waiting lists for assessment, which means they are not given the additional support they require on returning to the uk." (S_{er}.3_1)

9.3.1.2 THEME 2: Networks and socialising. The second most popular issue accompanying spouses/partners felt organisations should consider is the importance of helping family members network with other expatriates and be involved with activities in the host country:

"I think integration is essential when moving to another county, therefore joining of clubs, social events is essential in interaction with others" (S_{ec}.2_1)

Interaction was seen as very important and organisations should support and provide information to facilitate this:

"Social networking groups are very helpful to "trailing spouses" (S_{ec}.5_1)

9.3.1.3 THEME 3: Cultural differences and difficulties. The final theme from the responses related to the cultural differences of living in a different country and the importance of understanding and appreciating the difficulty of trying to adapt and live in a different country:

"Generally multi-national HR depts need to understand that life overseas is different from a typical UK life style. There are hardships and frustrations, sometimes beyond description." (S_{er}.10_1)

Providing support and help with such issues should therefore be considered for the whole family, including cultural briefings and training:

"Language lessons are incredibly important and should not be curtailed too soon (i.e. after only one year). The cultural briefing ought to cover the ups and downs of expat experience." (S_{ec}.5_1)

9.3.2 Other issues from the accompanying spouse/partner perspective. When accompanying spouses/partners were asked if there are any other important issues that organisations should consider, eleven currently expatriated accompanying spouses/partners and eight repatriated employee spouse/partners responded to this question. From these responses, the emergent themes were primarily around the provision of more help with settling in for all family members, and providing pre-visits and assessments.

9.3.2.1 THEME 1: More help. This theme taps onto some issues mentioned in the above questions. For example, respondents highlighted the importance of helping the family into the new life:

"I think the difference between established long term ex pats and new ones can be vast and there is an assumption by employers that local support will be given to people when they are posted overseas. Overseas offices are often smaller and therefore do not have the process, procedure or people families may be used to. I believe when internal transfers happen from a large to small centre a specialist central team is important to support the process which should be viewed as a 12 month bedding in period before a family can get over the impact of such a relocation and consider themselves settled" ($S_{er}.1_1$)

This includes the various practical issues of housing, schooling, and networking to establish friendships:

"Practical considerations such as where you live, schools attended, opportunities for adults and children to become involved by participating in sports/clubs/social activities." ($S_{ec}.8_1$)

To help with this, respondents highlighted the importance of the organisation being properly organised and having quality support in the host country:

"Company has to be 100% organised when sending employees abroad. It must have a robust process that explains the processes and policies in place for situations that the employee will normally find themselves in (e.g. healthcare in USA, dealing with social security etc). If an outsourcer is used to provide these services on the ground then that outsourcer should be regularly assessed" ($S_{ec}.9_1$)

9.3.2.2 THEME 2: More visits and assessments. The second theme from respondent answers related to the provision and allowance of more pre-visits:

"They should always give both partners and possibly children a visit to the place of the secondment. Whilst in the country or when they are back in their home country after the visit but before the secondment starts be briefed by someone who has been through the same experience in the same country even better if it is the same locations." ($S_{ec}.5_1$)

Family visits back home throughout the assignment were also noted in order to maintain friendships and family relations:

"Going home often enough to maintain friendships and family relationships." $(S_{ec}.7_1)$

It is also important that employees and their family are assessed for their appropriateness for the assignment:

"Yes-- They should take some can of test to see if they suitable--similar to this one!!!" $(S_{ec}.7_1)$

This includes assessing or making sure that families and marriages are secure enough to withstand the stresses and strains that moving and living abroad brings:

"We watched a fair percentage of our fellow expatriates' marriages fall apart, family values get confused and the disposable income change their lifestyles drastically. Drink, socialising and affairs were the main reason. Families and couples need to be very secure before embarking on these experiences - they need to be strong within themselves to weather the extremities of the assignments!" $(S_{er}.2_1)$

9.4 Summary

The results of the TAs conducted on the responses from expatriates, repatriates, and their accompanying spouses/partners have highlighted a number of important issues to be aware of with respect to language, organisational support, training, expectations, and the family. Some other issues have also been highlighted, which will be discussed in more detail in the Discussion chapter (Chapter 11). What can also been seen from the results is that expatriates and expatriate spouses share both similar and different concerns and experiences. The main difference is that the spouse does not feel involved with the organisation that is posting the employee and believes it is an important issue for organisations to consider. This in particular relates to the spouse employment and helping the spouse obtain work when in the host country.

10. Phase Three Results - Quantitative Results for Research Aim Two

The second aim of the final study in phase three attempted to further psychometrically assess the new expatriate personality measure developed in phase two, and upon satisfactory psychometric rigour, answer research question thirteen relating to incremental validity. The analyses are therefore divided and presented into two respective elements: 1) scale reliability and validity (Section 10.1); and 2) incremental validity (Section 10.2).

10.1 Scale Reliability and Validity

For this part of the research aim, the psychometric properties of reliability and validity are quantitatively assessed. Firstly, structural (construct) validity was examined using confirmatory factor analysis (CFA) (Section 10.1.1). This includes an examination of the internal reliability of the factors using Cronbach's alpha. Next, construct validity was further examined through the comparative validity of the scales against an already validated personality measure (i.e. BFI) (Section 10.1.2.). Finally, the criterion validity of the new expatriate personality measure was examined against the outcome variables selected for phase three (Section 10.1.3.).

10.1.1 Structural (construct) validity and internal reliability. The present study uses CFA for construct validation purposes and presents the results following the recommendations outlined by Jackson, Gillaspy, and Purc-Stevenson (2009).

10.1.1.1 Preliminary checks. The data must first be checked to ensure it is suitable for CFA. This includes examining outliers, normality, and missing data (Jackson, et al., 2009).

10.1.1.1.1 Univariate outliers. Standardised scores of the items (z scores) were examined, which showed 16 potential univariate outlying scores (.49%) (value >3.29; Tabachnik & Fidell, 2007, p. 73). Outliers affect the distribution of variables and in turn the subsequent analyses. Therefore, before deciding whether transformation of the data was required, inspection of the normality of variables was carried out.

10.1.1.1.2 Normality. Univariate normality was examined through skew and kurtosis. Results revealed no variables were skewed and three variables (12.50%) were kurtotic (i.e. coefficient values greater than +/-2.0). Ferguson and Cox (1993) posit an acceptability level of 25% of variables showing non-normality. As the percentage of kurtotic variables fell well within this acceptable limit, no transformation was carried out.

10.1.1.1.3 Multivariate outliers. In the present study, multivariate outliers were examined through Leverage values, which revealed no multivariate outlying cases for the personality domains.

10.1.1.1.4 Missing data. To run a CFA using AMOS, the dataset must contain no missing data. As the data set did not contain any missing data (hypothesis 9 is supported), this requirement was met and deemed appropriate to conduct the CFA testing the three-factor structure.

10.1.1.2 Confirmatory factor analysis (CFA). A CFA was conducted using AMOS version 16. Garson (2010) recommends using the Maximum Likelihood (ML) estimation procedure when conducting CFA. Given the acceptable normality shown in the variables, this procedure was followed. The adequacy of the proposed factor structure or model was examined through results of the goodness-of-fit tests, which provide evidence for the structural validity of the model. The tests selected were chi square (CMIN), Root

Mean Square Error of Approximation (RMSEA), and Comparative Fit Index (CFI). Although the sample size in the present sample is adequate for conducting CFA (>100, Garson, 2010), various measures can overestimate goodness of fit for sample sizes smaller than 200. Therefore, RMSEA and CFI were chosen as they are less sensitive to sample sizes than others (Fan, Thompson, & Wang, 1999). CMIN is also a conservative test and prone to Type II error (Garson, 2010). Therefore, the relative or normed chi-square (CMIN/DF) was also used (as recommended by Garson, 2010) as it is less dependent on sample size.

A CMIN/DF value of 2 or less reflects a good fitting model (Garson, 2010). For RMSEA, a value of up to and including .05 reveals a good model fit, and a value of up to and including .08 shows an adequate model (Garson, 2010). For CFI, values that are close to 1 indicate a very good fit, and should be equal to or greater than .90 to accept the model (Garson, 2010). The results of these tests were compared against these values to ascertain the appropriateness of the proposed factor structure of the new personality instrument. The results of the CFA are presented in table 10.1.

Table 10.1

Goodness-of-fit indicators for expatriate personality measure

mod	χ^2	df	CMIN/DF	RMSEA	CFI	*p*
i	1127.350	276	4.085	.151	.000	.000
3-f	461.237	249	1.852	.079	.751	.000

Note. mod = model. i = independence model; 3-f = three-factor model. df = degrees of freedom. CMIN/DF = relative chi-square. RMSEA = root mean square error of approximation. CFI = comparative fit index. *** $p < .001$.

The independence model testing the hypothesis that all variables are uncorrelated is rejected, χ^2 (276, CMIN/DF = 4.09; 276, RMSEA = .15; CFI = .00) =

1127.350, $p < .001$. For the three-factor model, two out of the three model fit indices (CMIN/DF = 1.85; RMSEA = .08; CFI = .75) suggest that the model has an acceptable fit but the CFI falling below the .90 level and a significant chi-square indices. These results could not unanimously confirm the structure within the given sample. Therefore, closer inspection of the data was required to try and understand why this occurred. In doing so, the analyses returned to an exploratory approach.

The adequacy of the data was firstly examined. As there was some kurtosis present in the data, the bootstrapping method was applied in order to correct for the non-normal data (Bryne, 2001). The outputs however, were the same as the previously reported CFA (therefore not reported again) suggesting the normality of the data was not an issue. Following recommendations of Brynes (2001), the next step for understanding the results was to examine the modification indices (MI) to ascertain whether a better fitting model could be achieved. The AMOS output presented several of the highest cross loading items and correlated errors. However, on inspection, the MI values were not very high or out of line with the other results providing no clear indication of how the model may be improved. Therefore, although the items appeared to be in the most appropriate factors, they do relate to other factors. This is in line with previous findings from study 2, suggesting that the three factors are correlated with one another. This is especially true of factor 1 and factor 3. Due to these close relationships between the factors, the low CFI value could be a result of a low level of differentiation between the factors, which when tested statistically, finds it difficult to find a clear distinction between the factors. To examine this, a two factor model (combining factor 1 and 3 together) and a 1 factor model were tested to determine whether a stronger model fit in the data could be found (i.e. >.90 CFI). The results are presented in table 10.2.

Table 10.2

Goodness-of-fit indicators for alternative expatriate personality measure models

mod	χ^2	df	CMIN/DF	RMSEA	CFI	p
1-f	569.907	252	2.262	.097	.627	.000
2-f	486.644	251	1.939	.083	.723	.000

Note. mod = model. 1-f = one-factor model; 2-f = two-factor model. df = degrees of freedom. CMIN/DF = relative chi-square. RMSEA = root mean square error of approximation. CFI = comparative fit index. *** $p < .001$.

The results suggest that neither the one-factor or two-factor models could reach the minimum CFI value. All values were found to be lower than the CFI value for the three-factor model (.75). The three-factor model was shown to have a significantly better fit than the one factor ($\chi^2_{difference}(3) = 108.64$, $p < .01$) or two factor ($\chi^2_{difference}(2) = 25.41$, $p < .01$) models. These results suggest that the three-factor model is the best fitting model despite not reaching some of the minimum requirement for a statistically acceptable model fit. Therefore, the three-factor structure is tentatively supported.

10.1.1.3 Internal reliability. The internal reliability of the three factors was examined using Cronbach's alpha. For inter-cultural openness, cultural apprehension, and cross-cultural disinterest, Cronbach's alpha was .76, .82, and .63, respectively. All of these factors therefore demonstrated acceptable levels of internal reliability and provide some support for this psychometric property.

10.1.2 Construct validity: Comparative validity. The following part of the analysis examines the correlations between the three narrow-bandwidth personality factors (inter-cultural openness, cultural apprehension, and cross-cultural disinterest) and the five broad personality traits (openness to experience, neuroticism, conscientiousness, extraversion, and agreeableness). Expected relationships were formed from the results of study 2 and produced the hypotheses displayed in table 7.3.

Correlational analyses were used to examine the relationships between the variables. MVA was carried out following the guidelines of Tabachnik and Fidell (2007). Results showed that no variables exceeded the recommended maximum 5 per cent amount of missing data. A statistically non-significant result was also shown from Little's Missing Completely At Random (MCAR) test, indicating that the missing data occurred completely at random: $\chi^2(4) = 0.19$; $p = .06$. Therefore, the missing data was not considered a problem and pairwise deletion of cases was used in subsequent analyses. The data was then explored for univariate and multivariate outliers. Standardised scores of the items (*z* scores) were examined, which showed no potential univariate outlying scores (>3.29; Tabachnik & Fidell, 2005, p. 73). Leverage values were examined for multivariate outliers. Using the recommended cut-off value of .50 by Garson (2008), results revealed no multivariate outlying cases. Finally, normality was examined through skew and kurtosis. Results showed no skewed or kurtotic variables (i.e. coefficient values greater than +/-2.0).

Given these preliminary results, the Pearson's Correlations Coefficients (*r*) was calculated to examine the relationships between the three narrow-bandwidth personality factors and the five broad-bandwidth personality traits. The results are displayed in table 10.3.

Table 10.3

Correlations between the narrow-bandwidth and the BFI personality variables

Variable	1.	2.	3.	4.	5.	6.	7.
1. Inter-cultural Openness	-						
2. Cultural Apprehension	.47**	-					
3. Cross-Cultural Disinterest	-.39**	-.40**	-				
4. Openness	.34**	.45**	-.47**	-			
5. Agreeableness	.31**	.30**	-.29**	.42**	-		
6. Extraversion	.22*	.58**	-.37**	.28**	.26**	-	
7. Neuroticism	-.30**	-.51**	.33**	-.37**	-.48**	-.53**	-
8. Conscientious-ness	.21*	.28**	-.09	.31**	.35**	.19*	-.36**

* p < .05 (one-tailed). ** p < .01 (one-tailed).

As expected, inter-cultural openness and cultural apprehension were significantly positively related to one another (r = .47) suggesting that higher scores in intercultural-openness are associated with being less apprehensive about new cultural experiences. Also as expected, cross-cultural disinterest is significantly negatively related to inter-cultural openness (r = -.39) and cultural apprehension (r = -.40). These results suggest that having low cross-cultural interest is related to having more inter-cultural openness and not being apprehensive about new cultural experiences.

Turning to the relationships between the narrow-bandwidth personality scales and the broader-bandwidth personality scales, the results suggest that inter-cultural openness was significantly positively related to openness (r = .34), agreeableness (r = .31), extraversion (r = .22), and conscientiousness (r = .21), as well as a significant negative relationship with neuroticism (r = -.30). Hypothesis eight (a) is supported and hypothesis eight (b) is unsupported.

Cultural apprehension was significantly positively correlated with extraversion (r = .58), openness (r = .45), agreeableness (r = .30), and conscientiousness (r = .28), whilst significantly negatively correlated with neuroticism (r = -.51). Hypothesis nine (a) is supported and hypothesis nine (b) is unsupported.

Finally, cross-cultural disinterest was significantly negatively related to openness, (r = -.44), extraversion (r = -.37), and agreeableness (r = -.29), whilst significantly positive correlated with neuroticism (r = .33). Hypotheses ten (a) is supported and hypothesis ten (b) only partially supported.

Each scale appears to be correlated with each Big Five scale in similar ways, although the strength of correlations were in line with those found in study 2. This provides some support for the underlying personality traits that the items were developed to measure. However, some unexpected relationships were also found, particularly with conscientiousness. Overall, the results provide mixed support for the construct validity of the new scales in terms of convergent and discriminant (comparative) validity.

10.1.3 Criterion validity. The following section examines the extent to which the newly developed personality scales relate to the various outcomes of an expatriate assignment under investigation in the research. Pearson's Correlations Coefficients (r) were calculated to examine the relationships between the three narrow-bandwidth personality factors and the continuous outcome variables. Point-biserial correlation coefficients (r_{pb}) were used to examine the relationships between the personality scales and the early return dichotomous outcome variable as recommended by Field (2007). The results are presented in table 10.4.

Table 10.4
Correlations between the newly developed personality factors and expatriate assignment outcome variables

Variable	I-CO	CA	C-CD
Adjustment	.37**	.44**	-.23**
Overall Performance	.10	.32**	-.30*
Technical Performance	.13	.31**	-.14
Contextual Performance	.14	.40**	-.23**
Expatriate-Specific Performance	.30**	.31**	-.14
Intention to leave the assignment early	-.24*	-.31**	.12
Willingness to go on another assignment	-.16	-.44**	.19*
Early Return	.14	.02	-.26

Note. I-CO = Inter-Cultural Openness. CA = Cultural Apprehension. C-CD = Cross-Cultural Disinterest. * $p < .05$ (two-tailed). ** $p < .01$ (two-tailed).

The results suggest that the narrow-bandwidth personality scales are significantly related to several expatriate assignment outcomes. In particular, cultural apprehension showed the most significant correlations, with cross-cultural disinterest and inter-cultural openness showing slightly less significant correlations, in that order.

Firstly, inter-cultural openness was significantly positively related to expatriate adjustment (r = .37), expatriate-specific performance (r = .30), and significantly negatively correlated with intention to leave the assignment early (*r* = -.24). These results suggest that higher levels of inter-cultural openness are associated with higher levels of expatriate adjustment and performance, and a lower intention to leave the assignment early. Hypotheses eleven (ii), (iii) were supported, hypothesis eleven (i) was partially supported, but hypotheses eleven (iv) and (v) were not supported.

Cultural apprehension showed significant positive relationships with adjustment, (*r* = .44), overall performance (*r* = .32), technical performance (*r* = .31), contextual performance (*r* = .40), and expatriate-specific performance (*r* = .31). Conversely, cultural apprehension showed significant negative correlations with intention to leave the assignment early (*r* = -.31) and willingness to go on another assignment (*r* = -.44). These results suggest that lower levels of apprehension are associated with higher expatriate adjustment, performance, and willingness to go on another assignment, as well as a lower intention to leave the assignment early. Hypotheses twelve (i) - (iii), and (v) were supported, but hypothesis twelve (iv) was not supported.

Finally, cross-cultural disinterest was significantly negatively related to expatriate adjustment (*r* = -.23) and contextual performance (*r* = -.23), as well as being significantly positively correlated with willingness to go on another assignment (*r* = .19) and overall performance (*r* = -.30). These results suggest that higher levels of cross-cultural disinterest are associated with lower levels of adjustment, performance, and willingness to go on another assignment. Hypotheses thirteen (ii) and (v) were supported, hypothesis thirteen (i) was partially supported, but hypotheses thirteen (iii) and (v) were not supported.

With regard to returning home early, the results suggested that there were positive correlations with inter-cultural openness and cultural apprehension, and a negative relationship with cross-cultural disinterest. None of the results were significant at the .05 level of probability, although cross-cultural disinterest had a small-to-medium effect size (Field, 2007).

10.2 Incremental Validity

The analyses sought to examine whether the narrow-bandwidth personality scales could better predict the expatriate assignment outcomes than the broader-bandwidth personality traits. Several regression analyses were conducted to assess the incremental predictive validity of the newly developed scales over the existing Big Five traits.

10.2.1 Hierarchical multiple regression analyses

10.2.1.1 Assumptions. There a number important assumptions that must be examined before conducting a multiple regression analysis. These relate to having an adequate sample size, the presence of outliers, normality of variables, homoscedascity, the absence of multicollinearity, and the independence of errors. Regarding the sample size for the following analyses, there are various heuristics used for determining the adequate sample size for conducting a multiple regression. According to Garson (2010), "fewer than five cases per independent variable is generally considered too low, even for exploratory research". Garson also highlights a rule of thumb advocated by Tabachnik and Fidell (2001), which states that the sample size must be larger than 104 plus the number of independent variables. As the present study's sample size exceeded either one or both of these heuristics, the sample size was deemed adequate for regression analysis to be used.

Univariate outliers and normality have already been examined in earlier statistical analyses and found to be acceptable (see Section 10.1.1.1). Multivariate outliers were re-examined for the present analysis variables using Levene's test, which revealed no multivariate outliers (Leverage >.5; Garson, 2010). According to Garson (2010), outliers are a form of violation from homoscedascity. Due to the absence of outliers and the normality of variables, confidence could be taken that this assumption was met.

The assumption of multicollinearity is when predictor variables are highly correlated (i.e. $r > .90$, Field, 2007). Inspection of the correlations between the various predictors show no highly correlated variables. The variance inflation factor (VIF) produced within the collinearity statistics was also examined to test for multicollinearity. Field (2007) states that if these values are less than 10, and the average VIF is not substantially greater than 1 then there is no cause for concern. The results of the average VIF for the following hierarchical regression analyses all show no cause for concern (i.e. all below 10, average VIF = 1.58). The assumption of absence of multicollinearity can therefore be assumed in the present data.

Lastly, the independence of errors was tested using the Durbin-Watson test as recommended by Field (2007). Values around 2 indicate that the assumption has been met. Any values greater than 3 or less than 1 are causes for concern. For the present study, all values were within the acceptable limits (range 2.01-2.34) indicating that this assumption was met. Overall, these results suggest that the data sufficiently met the assumptions necessary to conduct the regression analyses.

10.2.1.2 Analyses. Seven hierarchical (sequential) regression analyses were conducted to assess the degree of incremental predictive strength the new narrow-bandwidth personality scales had over the five broad-bandwidth personality trait scales on each of the continuous expatriate assignment outcome variables. The five personality trait measures were entered into the first step, and the three new personality scales were entered into a second step. The results are displayed in table 10.5[9].

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[9] The results are presented adopting the recommendations of Field (2007) as opposed to those of the American Psychological Association (APA)(2009, Table 5.14). This is because the additional statistics suggested by Field allow the interested reader to reconstruct the full regression models. All of the analyses are presented together to make the overall results easier to see. Therefore, a modified version of Field's (2007) table (7.2) is used.

Table 10.5

Hierarchical multiple regression analyses predicting expatriate adjustment, overall performance, technical performance, contextual performance, expatriate-specific performance, intention to leave the assignment early, and willingness to go on another assignment

	Dependent variables											
	A			P-O			P-T			P-C		
Predictor	*B*	SE *B*	β	*B*	SE *B*	β	*B*	SE *B*	β	*B*	SE *B*	β
Step 1												
Constant	3.20	.83	-	2.00	.79	-	2.67	.94	-	2.24	.83	-
Openness	.02	.11	.02	.16	.11	.14	.18	.13	.13	.03	.11	.03
Extraversion	.11	.08	.14	.09	.07	.12	.05	.09	.05	.11	.08	.14
Agreeableness	.04	.13	.03	.16	.12	.13	-.17	.14	-.12	.25	.13	.19*
Neuroticism	-.21	.11	-.21	-.10	.11	-.10	-.23	.13	-.19	-.16	.11	-.15
Conscientiousness	.14	.11	.12	.16	.10	.14	.41	.12	.30***	.13	.11	.10
Step 2												
Constant	2.00	.99	-	3.07	.98	-	2.44	1.18	-	2.47	1.02	-
Openness	-.13	.12	-.11	.09	.12	.08	.15	.14	.11	-.05	.12	-.04
Extraversion	.02	.08	.02	.03	.08	.04	.01	.10	.01	.02	.08	.02
Agreeableness	.01	.12	.01	.18	.12	.15	-.16	.14	-.11	.28	.13	.22*
Neuroticism	-.13	.11	-.13	-.08	.11	-.08	-.20	.13	-.17	-.11	.11	-.11
Conscientiousness	.12	.10	.10	.19	.10	.16	.40	.12	.29***	.13	.11	.10
Inter-Cultural Openness	.29	.13	.22	-.23	.13	-.18	-.07	.15	-.04	-.20	.13	-.15
Cultural Apprehension	.25	.12	.25*	.13	.11	.13	.16	.14	.13	.30	.12	.28**
Cross-Cultural Disinterest	-.03	.10	-.03	-.17	.10	-.17	.02	.12	.02	-.08	.10	-.07
Step 1 - R^2	.15			.19			.20			.20		
Step 2 - ΔR^2	.10**			.04			.01			.04		

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment. * $p < .05$. ** $p \leq .01$. *** $p < .001$.

cont. Table 10.5

	Dependent variables								
	P-ES			I			W		
Predictor	*B*	SE *B*	β	*B*	SE *B*	β	*B*	SE *B*	β
Step 1									
Constant	1.94	1.21	-	.53	1.34	-	1.67	1.19	-
Openness	.29	.16	.21	-.01	.17	-.01	-.01	.16	.00
Extraversion	.02	.11	.02	-.05	.12	-.05	-.18	.11	-.16
Agreeableness	.11	.18	.07	-.07	.20	-.04	-.10	.18	-.06
Neuroticism	-.16	.16	-.15	.50	.18	.40**	.28	.16	.20
Conscientiousness	.11	.15	.08	.15	.17	.11	.10	.15	.06
Step 2									
Constant	.40	1.54	-	1.94	1.71	-	2.44	1.42	-
Openness	.29	.18	.21	-.03	.20	-.02	.20	.17	.12
Extraversion	.01	.12	.01	-.05	.14	-.05	.03	.12	.03
Agreeableness	.07	.18	.05	-.05	.20	-.03	-.14	.17	-.08
Neuroticism	-.13	.16	-.12	.48	.18	.38**	.15	.15	.11
Conscientiousness	.10	.15	.08	.17	.17	.12	.12	.15	.07
Inter-Cultural Openness	.26	.19	.16	-.18	.21	-.10	.11	.18	.06
Cultural Apprehension	.08	.17	.07	-.08	.19	-.07	-.65	.16	-.45***
Cross-Cultural Disinterest	.14	.15	.12	-.17	.16	-.13	.08	.14	.06
Step 1 - R^2	.16			.18			.11		
Step 2 - ΔR^2	.03			.02			.11***		

Note. A = Adjustment. P-O = Performance (Overall). P-T = Performance (Technical). P-C = Performance (Contextual). P-ES = Performance (Expatriate Specific). I = Intention to leave the assignment early (current expatriate sample only). W = Willingness to go on another assignment.
* $p < .05$. ** $p \leq .01$. *** $p \leq .001$

The results from the hierarchical regression analyses suggest that the three narrow-bandwidth scales provide some extra predictive power over the Big Five trait measures. The prediction of expatriate adjustment was significantly improved following the addition of the narrow-bandwidth expatriate personality scales at the .01 level of probability. The adjusted R^2 value rose from .12 to .20 in step two, indicating that almost a quarter of the variability in the reported expatriate adjustment is predicted by the addition of the narrow-bandwidth personality predictors over the broad-bandwidth personality predictors. Predicting overall performance was slightly improved in step two, increasing the adjusted R^2 value from .16 to .18. This increase was not significant at the .05 level of probability. Predicting technical performance was again slightly improved in step two but not significantly at the .05 level of probability. The prediction of contextual performance was slightly improved in step 2, with an increase in adjusted R^2 from .17 to .19. This increase was not significant at the .05 level of probability. The prediction of expatriate-specific performance was marginally improved, with an increase in adjusted R^2 from .16 to .19, but again this improvement was not shown to be significant. Prediction of intention to leave the assignment early was improved from adjusted R^2 .18 to .20 in step 2, but not significantly. Finally, predicting willingness to go on another assignment was found to be significantly improved following the addition of the narrow-bandwidth expatriate personality scales at the .001 level of probability. The adjusted R^2 value rose from .07 to .17 in step two, indicating that almost one fifth of the variability in the reported expatriate's willingness to go on another assignment is predicted by the addition of the narrow-bandwidth personality predictors over the broad bandwidth personality predictors. Given these results, hypotheses fourteen (ii) and (v) were supported, but hypotheses fourteen (i) and (iii) were not supported.

10.2.2 Sequential logistic regression analysis

10.2.2.1 Assumptions. Following the assumption testing guidance of Field (2007), linearity, independence of errors, the absence of multicollinearity, and the study sample were examined. Linearity of the log of the outcome variables is examined through the interactions of the predictor variables. Significant interactions highlight a violation in the linearity assumption (Field, 2007). All interaction in the present analyses were non-significant at the .05 level of probability, indicating that the assumption of linearity has been met.

The assumption of independence of errors is similar to normal regression, in which cases of data should not be related (Field, 2007). If the assumption of independence does not occur, overdispersion is produced and the variance in the model can be larger than expected. This produces standard errors that are too small and increases the chance of Type I errors. The presence of overdispersion is tested by examining the ratio between the chi-square goodness-of-fit statistic and the degrees of freedom (i.e. dispersion parameter, $\emptyset$). Dispersion is present if the parameter is greater than 1, and will be problematic if greater than 2 (Field, 2007). Dispersion parameters were calculated for the overall model and the results revealed that independence of errors could be assumed (i.e. $\emptyset = .93$).

Multicollinearity is examined using VIF as used above (Section 10.2.1.1). The results for the current analysis variables produced VIF's within the acceptable limits (i.e. all below 10, average VIF =1.60). The assumption of absence of multicollinearity can therefore be assumed in the present data.

Finally, it is important to examine the ratio of predictors to cases (i.e. the sampling adequacy). If the ratio is insufficient, unreasonably large standard error values will results. This can occur because of insufficient data across the various categories, or because one predictor variables can predict perfectly the outcome variable (i.e. complete separation; Field, 2007). Garson (2010) proposed that expected frequencies in cells must be great than 5 and was achieved in the present data. However, other heuristics that relate to adequate sample sizes (e.g. Hosmer & Lemshow (1989) cited in Garson, 2010) propose at least 10 cases per independent variable, suggesting that the present data set is too small. Although sampling adequacy appears to have been met, the small overall sample size is acknowledged and the following results of the analysis are interpreted with caution.

10.2.2.2 Analysis. A sequential logistic regression analysis was used to test the incremental predictive value of the narrow-bandwidth personality predictors by controlling for a set of covariates (the five BFI factors). The results are displayed in table 10.6.

Table 10.6

Sequential logistic regression analyses predicting expatriate assignment early return

		95% CI for Odds Ratio		
Included	B	Lower	Odds Ratio	Upper
Step 1				
Constant	6.65	-	-	-
Openness	.93	.15	.92	5.72
Extraversion	.62	.30	1.00	3.37
Agreeableness	1.06	.04	.35	2.80
Neuroticism	.93	.11	.68	4.16
Conscientiousness	.95	.56	3.65	23.65
Step 2				
Constant	8.44	-	-	-
Openness	1.10	.08	.67	5.71
Extraversion	.81	.16	.78	3.81
Agreeableness	1.21	.02	.24	2.53
Neuroticism	1.07	.09	.75	6.10
Conscientiousness	1.25	.44	5.04	57.86
Inter-Cultural Openness	1.27	.11	1.30	15.62
Cultural Apprehension	1.21	.06	.63	6.65
Cross-Cultural Disinterest	.94	.03	.20	1.25
Step 1 - R^2		.07(Cox & Snell), .10(Nagelkerke)		
Step 2 - R^2		.06(Cox & Snell), .23(Nagelkerke)		

Note. 1=Yes, returned home early. 2=No, did not return home early. Model 1 Hosmer & Lemeshow (5) = 7.96, p = .45. Model 1 χ^2 (5) = 2.90, p = .72. Model 2 Hosmer & Lemeshow (8) = 7.25, p = .51. Model 2 χ^2 (8) = 7.43, p = .49.

According to Garson (2010), Hosmer and Lemeshow's (H-L) goodness of fit test is recommended for testing the overall fit of a binary logistic regression model as it is more robust than a traditional chi-square test, particularly when use continuous covariates or small sized samples. Meynard (2002, cited in Garson, 2010) suggests that it is also a useful statistic to use when the number of combinations of values of independent variables is roughly equal to the number of cases under analysis. An H-L value of greater than .05 suggests that the model is a good fit and a non-significant result indicates that the model prediction is not significantly different from the observed data (Garson, 2010). Given this, the results suggest that the present models in both steps are adequate and do not significantly differ from the observed data. With regards to whether the narrow-bandwidth personality predictors provide additional predictive strength over the BFI personality factors, the results of the omnibus tests (BLOCK) are examined as recommended by Garson (2010). The results suggest that the narrow-bandwidth predictors did not significantly add any predictive power: $\chi^2(3) = 4.52$, $p = .21$. Therefore, hypothesis seventeen (iv) was not supported.

From the results, it appears that there are several variables that have large confidence intervals. This suggests that the data contains the characteristic of underdispersion (i.e. the opposite of overdispersion as discussed in Section 10.2.2.1) (Field, 2007). This may have occurred because of the small sample size used for the present analyses.

10.3 Summary

Overall, mixed results were found to the hypotheses within the second research aim of the study. A summary of the results are presented in table 10.7.

Table 10.7

Summary of results for the psychometric property analyses for the new expatriate personality instrument (Research aim two)

Psychometric Property	Hypothesis (where appropriate)	Outcome (if applicable)	Supported/ Adequate
Reliability	Internal consistency		Supported
Validity Content (Item)	Low amounts of missing data		Supported
Construct Structural	A three-factor structure underlying structure of the new instrument.		Tentatively supported
Comparative (Convergent & Discriminant)	**H8**: Inter-cultural openness will be (a) significantly positively related to openness, agreeableness, extraversion, and significantly negatively related to neuroticism; and (b) unrelated to conscientiousness.		(a) Supported (b) Unsupported
	H9: Cultural apprehension will be (a) significantly positively related to extraversion and openness, and significantly negatively related to neuroticism; and (b) unrelated to agreeableness and conscientiousness.		(a) Supported (b) Unsupported
	H10: Cross-cultural disinterest will be (a) significantly negatively related to openness and extraversion; and (b) unrelated to agreeableness, conscientiousness, and neuroticism.		(a) Supported (b) Partially supported

cont. Table 10.7

Criterion	**H11:** Inter-cultural openness will be significantly related to…	i. expatriate performance	Partial
		ii. adjustment	Supported
		iii. intention to leave the assignment early	Supported
		iv. not returning home early	Unsupported
		v. willingness to go on another expatriate assignment	Unsupported
	H12: Cultural apprehension will be significantly related to…	i.	Supported
		ii.	Supported
		iii.	Supported
		iv.	Unsupported
		v.	Supported
	H13: Cross-cultural disinterest will be significantly related to…	i.	Partial
		ii.	Supported
		iii.	Unsupported
		iv.	Unsupported
		v.	Supported
Incremental	**H14:** The narrow-bandwidth expatriate personality measure will better predict …[i – v]… better than a broad-bandwidth personality measure.	i.	Unsupported
		ii.	Supported
		iii.	Unsupported
		iv.	Unsupported
		v.	Supported

11. Discussion and Conclusions

11.1 Discussion of Results

11.1.1 Research aim one. In terms of the important predictors of British expatriate assignment success, results of the qualitative focus group study suggested nine main factors. These reflect individual, organisational, and contextual-level factors. In order of their prevalence, these factors related to the individual employee, in particular the employee personality, and interest and desire to go abroad. The employee's spouse/ partner and family was the second most important factor highlighted, with the spouse/partner personality highlighted as key for organisations to consider if relocating a family. The employee's children were also suggested as important, as well as situations in which the employee left their family in the UK. Language was the third main factor, which related to issues when in the host country. The importance of organisational support and prior-knowledge of the expatriate assignment were also suggested, which included expatriate networks and contacts when in the host country and with home. Culture was another factor noted by repatriates, followed by the issues of what happens after the assignment (i.e. repatriation or non-return). The final factor related to adjustment to the host culture, which is also commonly regarded as an important outcome or conception of expatriate assignment success. An unexpected finding was also discovered from the focus groups, which highlighted a different conceptualisation of a successful expatriate assignment (i.e. willingness of the employee to go on another expatriate assignment). From these results, a model of British expatriate assignment success was proposed and empirically tested in phase three of the research, which includes new empirical evidence for an assignment variable that has not been previously explored at this level.

The model tested comprised of seven predictors (individual, organisational, and contextual variables), and five expatriate assignment outcomes (adjustment, performance, intention to leave the assignment early, whether the employee left the assignment early, and willingness to go on another expatriate assignment). The quantitative results from study three found mixed support for the proposed model and hypothesised relationships. Expatriate performance was significantly related to expatriate personality. However, only some of the dimensions of expatriate performance were significantly related to host country language fluency and whether the host country was English-speaking (expatriate-specific performance), POS (contextual and expatriate-specific performance), and expatriate expectations (expatriate-specific performance). Expatriate adjustment was significantly related to expatriate personality, whether the host country was English-speaking, the fluency with which the expatriate could speak the host language, POS, and expatriate expectations. Intention to leave the assignment early and willingness to go on another assignment was significantly related only to expatriate personality. Whether or not the employee returned home early from the assignment was only found to be significantly related to POS (adjustment). Overall, expatriate personality was significantly related to the most number of outcomes in the model, followed by POS, and expectations and language. A revised version of the British expatriate assignment success model is presented in figure 11.1, illustrating the significance of the individual and the organisation for achieving successful expatriate assignments. This simplistic model is derived from the empirical results of the thesis. A more sophisticated model could be proposed using existing literature. Therefore, the model is developed further in a later part of the discussion chapter (see Section 11.3) to be explored in future research.

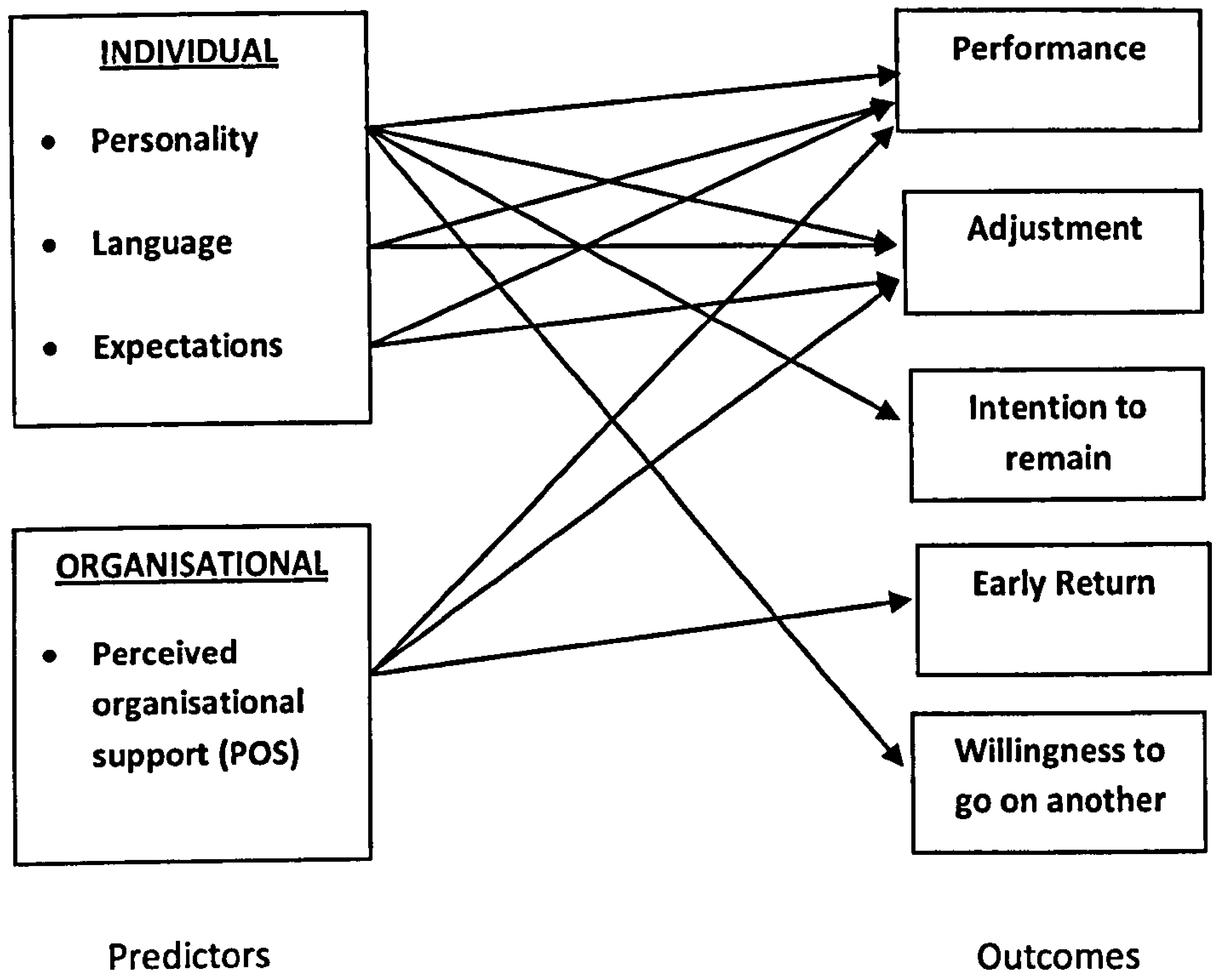

Figure 11.1 Revised working model of British expatriate assignment success

The significance of expatriate personality for influencing expatriate assignment success outcomes resonates with the recognition of its importance with other expatriates (Arthur & Bennett, 1997) and repatriates (Anderson, 2005). The empirical relationships found between personality and expatriate performance, adjustment, and intention to leave the assignment early are similar to those found in research conducted within the dominant US expatriate research (Caligiuri, 2000a, 2000b; Huang, et al., 2005; Parker & McEvoy, 1993; Stierle, et al., 2002; Swagler & Jome, 2005). More specifically, the Big Five traits of personality appear to show similar relationships as those demonstrated in existing research. For example, empirical research has found that extroverts are better adjusted (e.g. Armes & Ward, 1988; Swagler & Jome, 2005), and perform (e.g. Caligiuri, 2000a; Stierle, et al., 2002) better than introverts. Openness to experience is regarded as an important personality dimension for expatriates to possess if they are to perform well (e.g. Arthur & Bennett, 1997; Cheng & Lin, 2009), adjust in the new host culture (e.g. Huang, et al., 2005; Waxin, 2004), and not leave the assignment early (e.g. Ones & Viswesvaran, 1999). Research has shown that more agreeable expatriates relate to higher adjustment (e.g. Huang, et al., 2005), performance (e.g. Dalton & Wilson, 2000; Mol, et al., 2005) and the desire to terminate the assignment early (Caligiuri, 2000a). Research has also shown that high conscientiousness relates to expatriate adjustment (e.g. Swagler & Jome, 2005; Ward, et al., 2004), and performance (Caligiuri, 2000a; Dalton & Wilson, 2000; Mol, et al., 2005). Finally, previous research has found neuroticism (the negative pole of Emotional stability) to be significantly related to adjustment (e.g. Armes & Ward, 1988; Swagler & Jome, 2005; Ward, et al., 2004), performance (e.g. Mol, et al., 2005; Stierle, et al., 2002), and intention to leave the expatriate assignment early (e.g. Aryee, Chay, & Chew, 1996; Stierle, et al., 2002).

The significance of host country language and the fluency with which the expatriate can speak to host language reflects some the findings demonstrated in the expatriate adjustment literature. For example, previous research has found positive relationships with adjustment (e.g. Kraimer & Wayne, 2004; Nicholson & Imaizumi, 1993; Puck, et al., 2008; Shaffer, et al., 1999), therefore supporting the current research findings. The host country language and language fluency of the expatriate was not found to relate to intention to remain or leave the assignment early, as well as willingness to go on another assignment. Recent research similarly found no relationship between language fluency and expatriate job satisfaction (Froesea & Peltokorpib, 2011). Liu, Chua and Stahl (2010) suggest that it is the quality of the communication experience that influences the outcomes of intercultural interactions. So although the present research results highlight the significance of language differences as important obstacles faced by expatriates when they relocate to a non-

English speaking country and the importance of having a higher level of host-country language fluency, there may be additional dimensions of language and communication that may impact on the other expatriate assignment outcomes. Future research could explore this further.

The significance of POS with regards to expatriate performance are in line with existing research on these constructs. For example, positive relationships between POS and expatriate performance have been found (e.g. Kraimer & Wayne, 2004), suggesting that organisational support is important both domestically and for expatriate assignments. Given the significance of expatriate POS and their performance (contextual and expatriate-specific performance), the evidence supports the arguments by Eisenberger, et al (1986) who propose that higher POS will augment an employee's expectancy and provoke a commitment to repay the organisation for this support provided. This may include performance and may be explained by both social exchange theory (Liu, 2009) and organisational support theory (Rhoades & Eisenberger, 2002). POS was also the only variable that was found to be significantly related to whether an employee returned home early from the assignment, which has previously been unexplored in research. Therefore, the present research results suggest the organisation is the key factor for influencing expatriate assignment turnover.

The present research found that higher expectations were significantly related to lower adjustment and expatriate specific-performance, or lower expectations were related to higher adjustment and expatriate-specific performance. These results suggest that greater expectations of difficulties and challenges on the expatriate assignment impacted negatively on expatriate assignment success outcomes, or that having few expectations facilitated these expatriate assignment outcomes. These findings may relate to the accuracy of expectations. For example, if greater difficulties and challenges were expected but not met, then such unexpected experiences could have impacted negatively on these outcomes, similar to the results found by Wanous and colleagues (1992). Other research exploring expatriate expectations have found that accurate expectations were related to higher levels of job performance (e.g. Black, 1992; Stroh, et al., 1998). Therefore, findings suggest that having fewer expectations lower the risk of having unmet expectations. Further explanation and understanding of these relationships may also be derived the qualitative responses from study three, which are discussed later.

The importance of the spouse/partner and family highlighted from study one was not substantiated in the larger study in phase three. This included both the accompanying spouse/partner personality and the presence of the family abroad. The results showed that accompanying spouse/partner personality did not influence the expatriate's assignment outcomes. In other words, no crossover effect was shown. This may be due the low number of spouse/partner responses (n=19), which was insufficient to determine any patterns of influence. Sampling issues are discussed further within the limitations section of the chapter (see Section 11.2). The second family variable findings indicated that family presence on the assignment made no significant difference to expatriate assignment outcomes. This suggests that relocating the family or leaving them behind makes no difference to how successful the expatriate assignment will be. The presence of the family can offer support for expatriates that are dealing with work-related stress (Caligiuri, et al., 1998; Guzzo, 1996; Kraimer, et al., 2001; Lu & Cooper, 1995; Tung, 1981). However, negative effects can provide the opposite of support and result in reciprocal damaging influences across family members, including the expatriate employee (e.g. Black & Stephens, 1989; Caligiuri, et al., 1998; Harvey, 1985; Stierle, et al., 2002; Yang, 2007).

It may be that whatever family situation the expatriate is in, difficulties and challenges will always be present just in different forms. Therefore, there is no difference in assignment success outcomes based on whether the expatriate's family relocates or not (i.e. no family situation is superior over the other).

Finally, with regards to the new dimension of expatriate assignment success, personality was the only predictor found to significantly relate to an employee's willingness to go on another assignment. These are new relationships that have previously not been investigated at this level. This result reflects similar findings for the willingness to accept assignments in the first place (e.g. Aryee, et al., 1996). This finding has potential implications for business practice in terms of global staffing and talent management. For example, if an organisation wishes to develop international managers that undertake frequent international assignments, then the present research's results suggest that choosing the most suitable individual in terms of their personality is important. Talent management is emerging as a critical part of multinational business (Scullion, Collings, & Caligiuri, 2010), and given that shortages of internal talent management appear to be preventing the successful implementation of global strategies within EU organisation (Scullion & Brewster, 2001), the present findings highlight the importance of considering personality within the management of talent.

When examining the relationships with the outcome variables, results show different patterns of relationships with predictor variables (e.g. one predictor variable may significantly relate to performance but not adjustment). These results highlight the importance of not using a single construct or dimension for predicting a multi-dimensional conceptualisation of expatriate assignment success. A combination of individual and organisational-level variables appear to be the most influential for the success of an expatriate assignment.

Understanding the above relationships may be assisted by exploring the responses to the qualitative questions embedded within the final study. In terms of the host country language, most participants did not feel it was a problem in term of working or living in the host country because either English was mainly spoken, including within expatriate communities, or because the employee (or someone close to them) could speak the host country language. Other expatriates, however, did find the host country language a problem because it caused these individuals and their families to experience difficulties and feelings of embarrassment. The host country language was sometimes a problem for a number of expatriates either inside of work and not a problem for outside of work, or a problem outside of work and not a problem inside of work. With regards to anything that organisations could do to help with this host country language issue, the overwhelming response was the importance of providing training to the employee and their family both before and during the assignment. With respect to the statistical empirical relationships found, the qualitative responses have provided insight into the problems that not speaking the host language can cause when living in a different country, as well as providing some insight into why some expected relationships were not found. Mainly, that it depended on the context that the expatriate was in, or because English was mainly spoken anyway.

With regards to organisational support, respondents felt that it would be beneficial for organisations to provide information and advice about the move and setting up a new life. Also, providing a local contact in the host country was cited as an additional form of support that would have been useful. Providing more support to the family that had relocated with the employee was also noted, including helping the family build up a network in the host country. Finally, some respondents felt the organisation should provide more communication with the UK. Overall, these responses suggest that more organisational support would be beneficial, which fit the positive relationship between POS and the assignment outcomes shown in the final study (performance (contextual and expatriate-specific), adjustment, and early return).

The majority of respondents felt that training was an important part of moving overseas. In particular, culture training, language training, and job-related training were cited as the important types of training that should be provided. Other expatriates felt that training was not an important part of moving overseas because they felt they themselves did not need it because of moving to a similar role or because they were already familiar with the culture. Others felt that moving abroad was an experience and training cannot match that. Similarly, some respondents felt that finding the right person was more important as training cannot change the individual. A final group of respondents felt that the necessity of training depended upon the role, country and person. These mixed responses with regards to the importance of training may explain why no significant relationships were found between training and the expatriate assignment success outcomes when explored quantitatively. In other words, the qualitative responses also show no clear direction of whether training is a significant important factor.

Perspectives on whether the success of an expatriate assignment was influenced by expectations prior to leaving the UK were divided. Many respondents felt expectations had no influence due to expectations not being met, or because respondents felt it is more important to be open and flexible, or because these individuals had no expectations. Others felt that having expectations did influence the success of the expatriate assignment because they helped the expatriate prepare and plan for the assignment, as well as giving confidence to the individual because of an increased awareness of what was happening. When asked if there was anything that organisations could do to manage expectations, many respondents considered the provision of more information, providing more contacts and communication with other expatriates, and providing pre-assignment visits would be beneficial. Other expatriates argued that organisations cannot manage expectations because the assignment and/or the individual are too specific and different.

The mixed statistical relationships found in study three may reflect these different views, as most of the expatriate success outcomes had no significant relationships and thus support the views given by many respondents that having expectations had no influence. The reasons for the lack of expectation influence may reflect the extrapolative view of how expectations are formed (Harvey, et al., 1994), namely from past experiences. Experiences abroad will be significantly different from previous domestic experiences, rendering expectations formed on them inaccurate or unhelpful. This may also explain why respondents felt that having expectations are of no use due to expectations never being met. Consequently, lower expectations would in turn be more beneficial, which was found in the present research for expatriate adjustment and expatriate-specific performance.

Within the research, participants were asked about their family situation and what (if any) issues they felt were important for organisations to consider when posting an employee and their family abroad. Expatriates within the family relocation situation highlighted issues around having children (such as schooling and childcare facilities), issues related to their partner/spouse (such as their networking and career), the provision of prior information and support, and allowing enough time for the expatriate and their family to prepare and settle in the host country. Expatriates within a family situation where their family did not relocate with the employee advocated the provision of more allowances. For example, more facilities such as more flights for family members or more holidays to go home and visit friends and family. If provisions such as these were employed by organisations, the presence of the family abroad or the difficulties faced when leaving the family behind may have a more positive influence on expatriate assignment outcomes as negative effects of family presence or leaving the family behind may be less. Exploring the perspective of the accompanying spouse/partner may help understand these finding more.

Accompanying spouses/partner responses highlighted three important issues relating to the accompanying spouse and the family. Issues concerned any children within the expatriate family, and included issues of schooling and any special requirements the children might have. This finding supports the notion that children can place a high amount of demand on parents (Kupta & Cathro, 2007). Networking and socialising in the host country was also noted, along with the importance of understanding and appreciating the difficulties of trying to live and adapt to a new country, which the organisation should provide support or training to facilitate with this. These issues and concerns of the spouse are similar to those of the employee and highlight that expatriate family members (i.e. spouse and children) experience similar difficulties and challenges to those faced by the expatriated employee.

Final suggestions from the accompanying spouse/partner about what organisations should consider when sending an employee and their family on an expatriate assignment included providing more help with the move, and also providing more visits and assessments of suitability. These suggestions are similar to issues raised by the expatriated employees and again, stress the importance of assessment. This aspect is directly attended to within the second objective of the research.

11.1.2 Research aim two. This section of the discussion focuses on the second research aim, which aimed to develop and psychometrically assess a new expatriate personality measure on British employees. This objective was addressed in phase two and three of the research following the scale development guidelines of Hinkin (1998). Results of the initial instrument development showed a three-factor structure. Factor 1 was labelled Inter-cultural Openness and is associated with being open and unprejudiced to new cultures and people of different cultures. Individuals who score high on this scale do not view people from other cultures as inferior because they are not from the UK. These individuals are happy to have friendship with people who are of a different nationality to themselves and feel comfortable speaking to someone who is a not native to the UK. Individuals who score low on this scale hold prejudiced view on people from different cultures, perceiving them to be different and unequal in the UK. Factor 2 was labelled Cultural Apprehension and is associated with being anxious and apprehensive about new cultural experiences. Individuals who score high on this scale do not worry or feel tense about being in a new cultural environment. Individuals who score low on the scale feel nervous about being in a different culture or country, and can sometimes be overwhelmed in these novel situations. Finally, factor 3 was labelled Cross-Cultural Disinterest and is associated with an individual having little interest in or excitement by new cultures, which includes not engaging in and discussing different cultures. Individuals who score high on this scale do not take part in different cultural activities and are not interested in understanding the perspective of someone from a different culture or belief system, such as their religion. People who score low on this scale enjoy engaging in and are excited about being in a different culture.

With regards to the instrument's reliability, validity and generalisability, overall the instrument had mixed results, and although adequate in a number of ways, further development and investigation would be beneficial. Firstly, internal reliability was sufficiently demonstrated in both studies. Validity was explored both logically and empirically through assessments of content validity, construct validity, and criterion validity. Incremental validity was also examined to determine whether the new expatriate personality instrument could better predict expatriate assignment outcomes than an existing broader-bandwidth personality measure. Content validity was adequately shown due to the low levels of missing data and careful item generation and coding by experts and social science researchers. However, in terms of construct validity, some unexpected results were shown. For example, the original five-factor structure for the measure was not produced from study two. Instead, a three-factor structure was produced that reflected a compound personality scale.

Compound personality scales are determined by several dimensions of the Big Five (Ones, Dilchert, Viswesvaran, & Judge, 2007). Due to a new underlying factor structure resulting, the relationships with the Big Five traits were examined to establish whether the incumbent items generated within a trait were related to the personality factor. In general, the incumbent items within the new scales did reflect the expected relationships with their conceptual personality trait. This was not found for cultural apprehension, for example, when an unexpected significant relationship with openness was found, which did not reflect the majority item-trait associations. A recent study on student multicultural friendships also show similar relationships between these personality traits and characteristics, with higher international friendships related to higher levels of openness and lower levels of intercultural communication apprehension (Williams & Johnson, 2011). In light of this recent evidence, the relationships are therefore not so surprising. Also, this was the lowest significantly correlated trait and the results showed that other openness items were present in the three-factor structure before the conceptual refinement exercise. Therefore, although unexpected, the relation between the new scale and this trait was understandable due to these items being statistically grouped together from the EFA. In turn, this result is not considered a serious cause for concern with respect to construct (comparative) validity within study two.

It should be noted however, that cross-cultural disinterest has only four items, which are all in one direction. This scale met the minimum number of items recommended by Harvey, Billings, and Nilan (1985) outlined in Chapter Three, and reflects another recent four item published psychological scale (Paul, Meyskens, & Robbins, in press). According to Hulin and Cudeck (2001) "the quality of items may be more important than the quantity of items" (p.57). In the present research, acceptable internal reliability of this smaller more economical scale was met and is therefore not of concern. However, balancing the items within a scale is advantageous as it reduces potential response set bias (Price & Mueller, 1986) and acquiescence (Saucier & Goldberg, 2002). Therefore, it may be advantageous to create some additional items to balance the scale.

Further examination of the instrument's construct validity was carried out in the final phase of the research and mixed results were shown. For example, the structural (construct) validity of the new expatriate personality scales was examined using CFA in phase three. Results suggested that the three-factor structure was the most appropriately fitting model structure when compared to other models despite some of the model fit indices did not meet the minimum acceptable levels in the current dataset. Similar results have been found in other research (e.g. Kelloway, Loughlin, Barling, & Nault, 2002), whereby various models were compared and the best fitting-model was accepted despite not meeting the .90 CFI level advocated. One reason for low model fit indices could be due to the factors being strongly correlated with one another, making it difficult for a clear statistical model to show. However, when compared to other model structures, the three-factor model had a significantly better fit. Therefore, structural validity could be tentatively supported.

Investigation into comparative validity revealed that convergent validity could be mainly assumed, but discriminant validity could not. One reason for this could due to sampling or the populations used (i.e. British employees versus British expatriated samples). It could be that the sample type is influencing the results in a way that makes the pattern of relationships between the new scales and the Big Five personality traits. Therefore, it may be premature at this stage to conclude that the new expatriate personality instrument has questionable construct validity. More research exploring the instrument's construct validity should be undertaken within another larger British expatriate population to determine whether a similar pattern of relationships between the new scales and the Big Five personality traits emerges. Also, larger samples may improve the model fit indices when examining the new instrument's structural validity.

Criterion validity was demonstrated across the several expatriate assignment outcome criteria. For example, inter-cultural openness was significantly positively related to adjustment and performance (expatriate-specific), and negatively with intention to leave the assignment early. Cultural apprehension was significantly positively related to expatriate performance, and adjustment, and negatively related to intention to leave the assignment early. Finally, cross-cultural disinterest was significantly related to adjustment, willingness to go on another assignment, and performance (overall and contextual). Overall, an acceptable level of criterion validity has been demonstrated for the new expatriate personality instrument. In turn, the findings suggest that an individual who does not view people from other cultures as inferior because they are not from the UK, are happy to have friendship with people who are of a different nationality, feel comfortable speaking to someone who is a not a native to the UK, do not worry or feel tense about being in a new cultural environment, enjoy engaging in and are excited about being in a different culture are likely to adjustment and perform well on the expatriate assignment. These individuals would also be unlikely to intend to return home early and be more willing to go on another assignment.

With regards to whether the new narrower-bandwidth expatriate personality instrument can better predict expatriate assignment success than a broader-bandwidth personality measure, the results in phase three suggest that is can when conceptualising expatriate assignment success as adjustment and willingness to go on another assignment, but not in terms of performance, intention to leave the assignment early and actually leaving the assignment early. The improved predictive validity of narrower-bandwidth personality measures supports previous research suggesting that narrow-bandwidth personality measures can have higher fidelity (e.g. Hastings & O'Neill, 2009; Paunonen, 1993; Salgado, 2002). Therefore, narrower bandwidth measures such as the present research's are potentially more advantageous in selection contexts. Given the present research's results, the new expatriate personality measure may be a useful selection instrument for British multinational organisations.

It should be noted that not all of the expatriate assignment outcomes were better predicted by the new expatriate personality measure. This may be due to the new personality scales having different levels of conceptual over-lap with the outcome variables and/or appropriate bandwidth for the various outcome variables. For example, it may be that the scales and incumbent items are not related or specific enough to all the criteria of interest (i.e. the new scales do not reflect the same degree of narrow-bandwidth as facet level personality scales). Having different conceptualisations of job performance may also influence this degree of overlap and resultant relationships with the scales. Alternatively, given that the new scales do not predict job performance over and above the broader bandwidth personality measures, it suggests that the new compound scales are not as broad of the Big Five personality traits that have been found to be better at predicting general job performance by some researchers (e.g. Ashton, et al., 1995; Dudley, et al., 2006; Ones & Viswesvaran, 1996). Overall, the new compound expatriate personality scales could be specific enough to predict some closer conceptual over-lapping expatriate assignment outcomes, but not as broad or narrow as the Big Five personality trait dimensions or facets, respectively, to predict all the expatriate assignment outcomes of interest. This is displayed as a continuum below in figure 11.2.

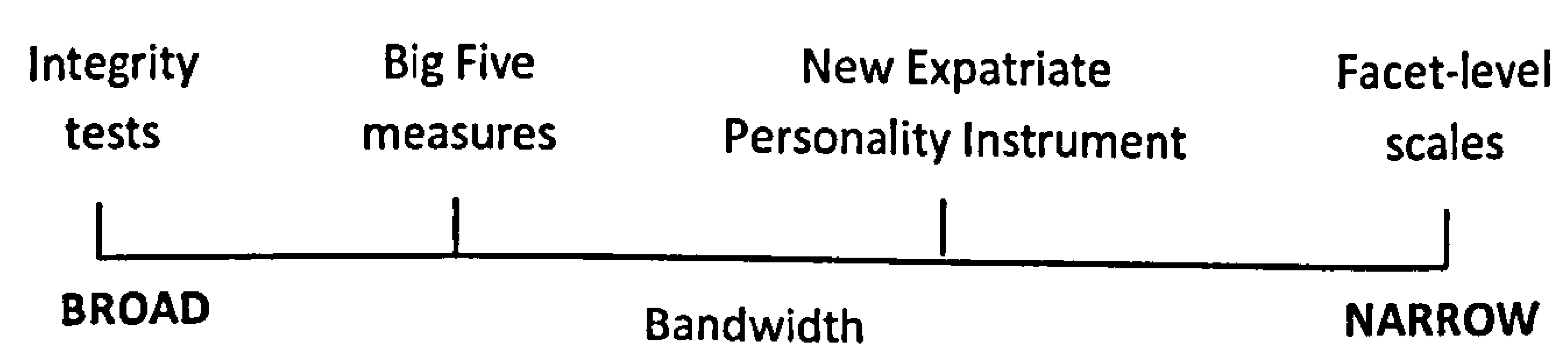

Figure 11.2 Proposed bandwidth continuum

However, whilst significant incremental predictive power was not shown, some improvement in predictive power was demonstrated for all outcome variables. More investigation of the incremental validity of such measures should therefore be carried out before concluding the new expatriate personality scales are not better than the Big Five trait personality measures in predicting other expatriate assignment outcomes.

11.2 Limitations

A potential limitation of the research is the small sample sizes within the studies conducted with expatriates. The low number of participants in the first study resulted from two factors. Firstly, not all of the anticipated participants turned up for the focus groups, leaving some focus groups comprising of only two participants. This is a common complaint of focus groups, but is not exclusive to the method. Suggestions for overcoming this problem include inviting more participants than needed in order to avoid low numbers from no-shows (Wilkinson, 2008). It was the aim of the researcher to avoid having too many participants in the focus group, as suggested by Morgan (1998), as it was anticipated that participants would have a lot to say. This permits lots of rich data to be derived and be in a better position to control the focus groups. According to Richardson (2006), small samples are appropriate for qualitative research and although the focus group sample sizes could be considered low, they do fall within what is typically used in focus groups research (i.e. between 2 and 12, Wilkinson, 2008).

The second reason for low numbers was due to the fact that only four focus groups were conducted. Suggestions have been made that researchers should aim for between 12 and 15 focus groups (Bryman, 2001) and the point whereby focus groups can be stopped is when a saturation point has been reached (Calder, 1977).

For the present study, saturation was reached on the fourth focus group. There was therefore little reason to continue conducting focus groups as little or no extra information would be obtained. According to Bryman (2001), continuing to conduct more focus groups would require additional time and resources, which are not necessary or pragmatic. The decision would also have required more repatriated UK employees who could serve as potential participants for the final study of the research. The notorious difficultly of obtaining access to this group of employees would place even greater pressure on the time and resources of the researcher.

Expatriates are a notoriously difficult sample to recruit. For example, the difficulty of obtaining expatriate employee samples was illustrated by Arthur and Bennett (1995), who approached 1,828 organisations to ask permission to approach their employees for the research study. Only 3% of these organisations agreed to participate in the research. The present research experienced similar difficulties in recruiting large (i.e. >n=200) for the analyses. Other researchers have opted to use students and volunteer samples because they are easier and cheaper to recruit than expatriate employees (Deller, 1997). Others have instead conducted research on fewer than 60 participants (e.g. DiMarco, 1974; Shimoni, et al., 2005; Smith, 1966). Such small samples limit the statistical power of the research findings (Sinangil & Ones, 2001), which can lead to Type I or Type II errors and prevent the results from being generalised. Within the final study of this research, a sample size of 136 was produced, which is larger than many expatriate employee research studies, including British expatriate studies (e.g. Beaverstock, 2002; Everett, et al., 1982; Forster, 1999; Harris, 2002; Peterson, et al., 2000; Scott, 2004, 2006; Selmer, 1997, 1999; Selmer & De Leon, 1997; Stening, et al., 1981; Ward & Kennedy, 2001; Yeoh & Willis, 2005). Also, access to these employees are often more difficult than accessing the managerial counterparts (Collings, 2008) suggesting that the present expatriate employee sample is superior to many previous studies in this respect.

Another potential limitation of the research relates to the retrospective design in phase one and three. For example, participants were required to have been posted and returned to Britain at least once from an expatriate assignment. Some participants may have been back in Britain for a number of years. Distortions in human memory (or errors of commission) when attempting to recall events from the past highlight the fallibility of memory (Johnson, Raye, Mitchell, & Ankudowich, 2011). The length of time between the assignment and the research could therefore have impinged on the accuracy of participants recollections of events that could have in turn, influenced the results. However, the nature of the questions and part of the conceptualisation of expatriate success that organisations are interested in required participants to have experienced at least one assignment in order to provide their opinions and views on important factors to consider. Current expatriates may not have experienced enough of the assignment to provide the quality of information that former-expatriates could. So although memory distortion could have occurred, it was necessary to use these participants in the research. If the research was to be replicated, restricting participants who had returned within a short time frame may overcome this issue. However, this would narrow down the potential pool of participants from an already difficult sample to access (Takeuchi, 2010).

A cross-sectional design was also employed in the research (i.e. current expatriates in phase three). Limitations of this design are typically related to the problem of association and causal relationships. The issue of common methods variance (CMV) is often cited as an issue with cross-sectional and self-report studies. CMV has been proposed as a potential problem for behavioural research (Podsakoff, MacKenzie, & Lee, 2003) as it is believed to inflate correlations between variables. However, Spector (2006) argues that this position is an inaccurate and oversimplification of what is actually occurring, and suggests the CMV term be abandoned as it merely reflects an urban legend. Instead, acceptance of the biases within a certain design or method should be considered, and if necessary accepted. For example, in the present research a self-report performance measure was used. Using other-rater groups (e.g. supervisors) may overcome biases within self-reporting of performance (e.g. impression management, social desirability). However, using such designs would require more time and resources to achieve them. Also, there are limitations and problems with supervisor ratings of performance surrounding who and how performance is assessed, which have been highlighted earlier in the thesis (see Section 5.2.2.). Therefore, given the noted difficultly of gaining access to organisations that use expatriate assignments, the chosen design of the research is therefore considered appropriate and pragmatic for achieving the objectives set, and the above potential limitations are noted and accepted.

In relation to the cross-sectional design of the final study, another potential issue relates to time spent on the assignment. Expatriates currently on an assignment have been on the assignment for different lengths of time. As a result, expatriates may be at different stages of adjustment (i.e. where they fall of the U-Curve theory of adjustment, Gullahorn & Gullahorn, 1963). Consequently, this may have influenced the results and how well they perceive themselves to be performing or whether they intend to remain on the assignment or not (Cui & Awa, 1992). To overcome this issue would require restrictions on expatriates in terms of how long they had been on the assignment or statistically controlling for time spent on the assignment. For future research, these approaches may be useful for overcoming this issue. Appropriate sample sizes must be collected accordingly. Given the relatively small sample sizes in the present research, this extra variable may have limited the appropriateness of the statistics used and the generalisability of the findings.

11.3 Future Research

As well as some of the suggestions noted in the above sections, other interesting future research could be conducted. Firstly, research including more of the factors highlighted from study one could be investigated. Also, some of the ideas highlighted in the qualitative responses provided by expatriates and their accompanying spouses/partners could suggest some future research. For example, more research exploring expatriation budgets and allowances for the employee and their family. Repatriation was also highlighted as another important issue, as mentioned in the focus groups in phase one. Repatriation has been a popular focus of expatriation research in the last decade or so partly due to the high turnover of expatriates being a critical concern for organisations (Stevens, et al., 2006). Within the British expatriation literature, repatriates have also been sampled (e.g. Forster, 1994). However, it is still unknown what the key antecedents are for successful repatriation processes from the perspective of the expatriate. Therefore, more repatriation research from this employee perspective may be useful, as it may also be from the repatriating spouse/partner or child.

Another important issue highlighted from the qualitative responses of the expatriate employee samples related to the single expatriate and consideration for the needs and circumstances of this other group. Single expatriates are different and more isolated than expatriated employees with families. The networking and social life of single British expatriates have been explored previously in research (e.g. Walsh, 2007; Willis & Yeoh, 2007). However, exploration into the isolation that these expatriates experience and what behaviours are successful in helping the expatriate cope with and overcome any of the negative effects of feeling lonely have yet to be studied. Such behaviours may include socialising and networking, but research specifically exploring the specific needs of single expatriates may help the organisation to understand this population's needs and how to accommodate for them. Examining important issues and concerns for this group of expatriates may provide useful insight into what are significant predictors for expatriate assignment success. Also, comparisons could be made between single expatriates and married expatriates or expatriates in a relationship. This area of comparative research has yet to be fully investigated.

The above section also discussed the importance of expatriate expectations and how expectations are formed. There is little empirical research on expectation formation within expatriation. More research specifically exploring expectation formation within the expatriate context would be useful to understand what contributes to expatriates feeling more confident as a result of their expectations. Understanding how this confidence relates to the expectations could provide guidance for organisations, practitioners and any individual moving abroad.

A new expatriate outcome variable was explored within the present research. Willingness to go on another assignment has been mentioned in previous research (Bossard & Peterson, 2005) but has not previously been empirically explored from the perspective of the individual employee. Nor has the reasons why employees think this is an important factor to consider. Conducting research that explores why employees think it is important to consider may be useful for organisations as it may provide insight into employees' willingness to relocate. These perspectives could be compared with organisation's views on the outcome to determine whether it is of mutual interest. If so, it could also have implications in terms of expatriate assignment success measurement. A recent study (Hemmasia, Downesa, & Varner, 2010) developed a multidimensional scale for expatriate assignment success based on the existing literature. The present research's findings suggest that it may be beneficial to include an additional dimension of willingness to go on another expatriate assignment. Given the investment by organisations in these types of assignments, and the goal of many organisations to develop international mangers, measuring and understanding factors that contribute to employee being willing to go on another assignment may be fruitful for organisational competitiveness. Therefore, examining an extended version of the multidimensional expatriate assignment success scale may place added value on the utility of the measure.

Returning to the newly developed working model of expatriate assignment success, it is possible that a more complex model may be more appropriate when attempting to predict expatriate assignment success. For example, earlier discussions around conceptualising expatriate assignment success noted that criticisms as using adjustment as an outcome of assignment success (see Section 5.2.1). It has been argued that adjustment is a process that occurs on the assignment, and is more accurately understood as a key mediator of expatriate assignment success (Takeuchi, et al., 2002). Given this, a more complicated model of British expatriate assignment success can be hypothesised in which adjustment is proposed as a mediator variable in between the predictor and outcome variables (see figure 11.3). If adjustment is found to be a key mediator in the relationships between the predictor and outcome variables, the empirical relationships found in the present research could be augmented. It may also be the case that other predictor variables that were not found to be significantly related to the outcome variables may then be significant. This is an interesting avenue for future research to explore in order to develop the simple model of British expatriate assignment success found in the present thesis.

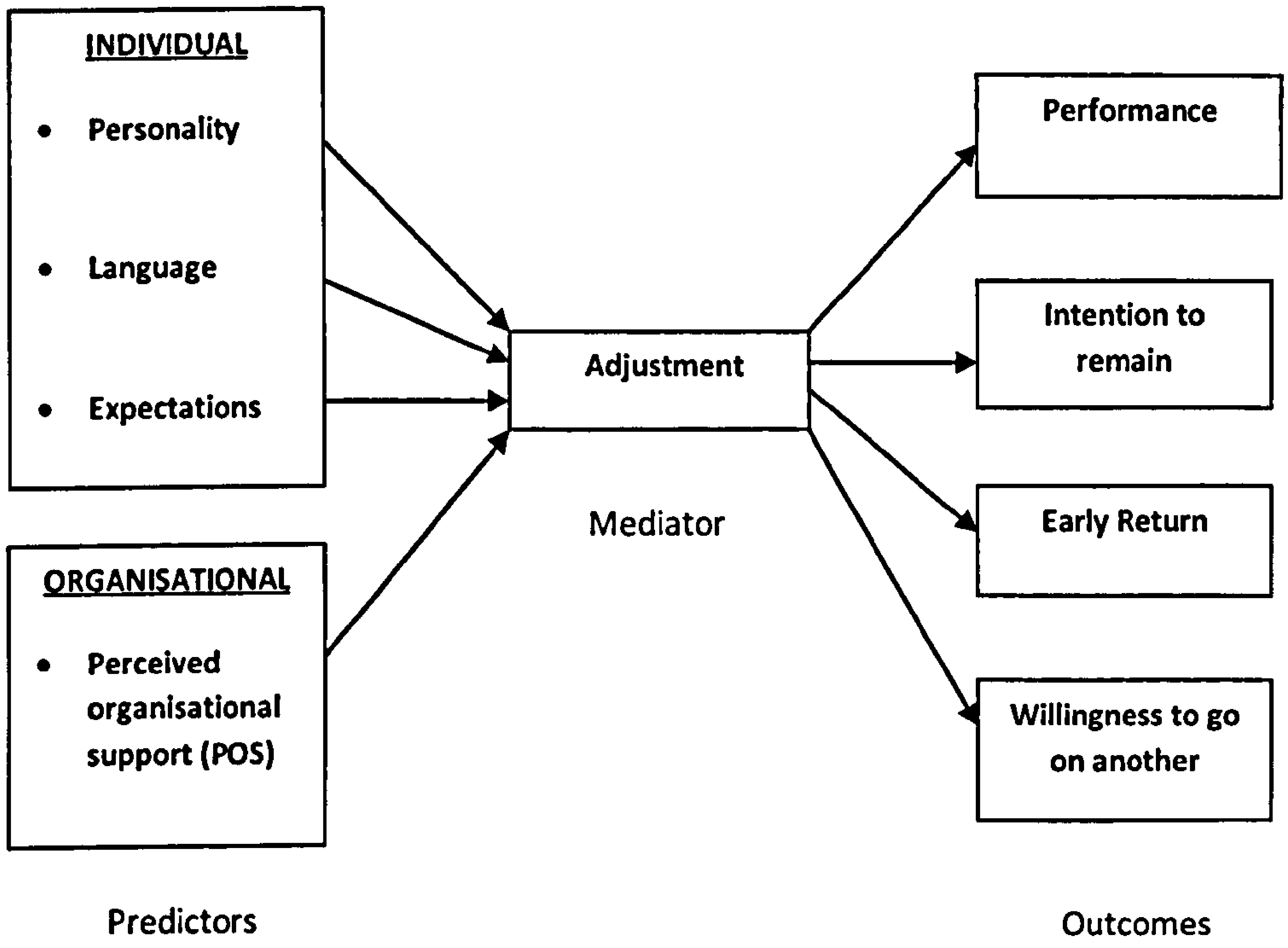

Figure 11.3 Revised hypothetical model of British expatriate assignment success

Turning to future research around the newly developed expatriate personality instrument, further research exploring the performance of the instrument is necessary to determine its full utility for use in organisational settings. For example, together with suggestions mentioned above, research comparing the performances of the new expatriate personality instrument with other measures, such as the MPQ, would be useful to determine which psychometric test may be more useful for expatriate selection. If the new expatriate personality instrument performs better when conducted within a British expatriate employee sample as opposed to another nationality sample, the research may provide further evidence of the culture-bias of tests. In addition, the findings would support the rationale for nationality-specific test development. Research could also explore the relationship and performance of the new instrument with the various intelligences considered important in expatriation (see Lee, 2010). This namely includes cultural intelligence (CQ), which is growing in recent popularity (e.g. Harrison & Brower, 2010; Ramsey, Leonel, Gomes, & Monteiro, 2011). However, modifications to the instrument may be necessary (i.e. balancing the cross-cultural disinterest scale), which may improve the instrument's predictive powers over existing measures and relationships on different criteria of interest.

Other populations could also be empirically examined with the new measure to establish the reliability, validity, and generalisability of the instrument. For example, expatriate spouses/partners could be sampled to determine if the measure can be used to assess the suitability of family members for an expatriate assignment. This could also include sampling children and students, again to determine whether it can assess family suitability, but also to determine the instrument's utility in predicting other important outcomes related to these groups (e.g. academic performance overseas). From the qualitative responses, assessments were highlighted as important from the perspective of the accompanying spouse/partner. Respondents felt it was important to assess the suitability of employees and their family, as well as having health assessments during the assignment. Therefore, these populations may welcome such research and organisations may employ the new instrument if positive results are found.

Research exploring the bandwidth of the new personality scales may also be interesting and show where the new instrument lies in relation to the bandwidth continuum (figure 11.2). This could be done by adopting the experimental design of Hampson, John and Goldberg (1986) who examined category breadth and asymmetry of personality traits by using two breadth deciding methods. The first involved direct ratings of breadth, and the second involved judgements of breadth from paired statements between two traits. Using this approach, similar ratings could be used for different personality measures of apparent different breadth. For example, this could include integrity tests, a Big Five measure of personality, the new expatriate personality measure, and some facet-level scales. The results may provide an indication of where the personality measures fall with respect to the bandwidth continuum and provide further insight into the fidelity-bandwidth debate.

The final suggestion for future research relates to expatriation research design. Longitudinal research is commonly cited as the ideal way to explore the process of expatriation and more research of this design needs to be adopted (Richardson & McKenna, 2006). A longitudinal study permits investigation of the temporal relationships of various variables considered important for expatriate assignment success. This may include moderated and mediated relationships. To conduct a piece of research such as this would require a high degree of commitment from organisations and expatriate employees. Also, large samples would be required in order to conduct moderator and mediator analyses. Although longitudinal studies within expatriation research are difficult, some research of this design has been conducted (e.g. Anderzen & Arnetz, 1997; Fisher, 1985; Hammer, Neal, Newsom, Brockwood, & Colton, 2005; Suutari & Brewster, 2003; Takeuchi, Wang, & Marinova, 2005; Wang & Takeuchi, 2007; Ward, et al., 1998). Nevertheless, more is needed in the future to not only contribute to existing theory and knowledge, but also help provide guidance for practice in organisations.

11.4 Conclusions and Contributions

Earlier research by Tung (1988) suggested important factors for expatriate assignment success from the perspective of the UK organisation. From the current research's employee perspective investigation, some similarities can be seen including the importance of the employee's personality and appropriate selection. The importance of organisational support is also shared, however, other factors highlighted by Tung (1988) were not found in the present research. These differences draw attention to the importance of considering different perspectives of stakeholder involved in expatriate assignments, supporting the views of Brewster and Scullion (2007). Also, the present research findings suggest that whilst some generalisations of US expatriate research findings and theory can be applied to the British expatriate population, there is evidence to suggest that differences do exist and generalisations not always appropriate. Acknowledging the differences between these nationalities is important and more nationality-specific research is warranted, not only on more British expatriate populations but also on other non-US nationality expatriates as well. This supports Heine's (2010) emphasise to conduct more psychological research in different cultures to empirically assess generalisability.

The present research has made several contributions to both knowledge, theory and for practice in organisations. The main contribution is conducting expatriation research on an under-researched population of expatriates. Lett and Smith (2009) describe this as re-addressing the imbalance in expatriation research that has largely been carried out in the US. Concerns over the unrepresentative and over-generalisation of research findings to non-US countries has been raised (McDonnell, Lavelle, Gunnigle, & Collings, 2007). This has produced a biased perspective within the expatriation field and researchers have called for a broadened research agenda and conducting expatriation research in other national contexts (e.g. Brewster & Scullion, 2007; Scullion & Brewster, 2001). The research conducted here has therefore contributed to this call and provided insight into British expatriation, resulting in an initial model of British expatriate assignment success that may be useful for practitioners and organisations.

Another contribution of the research has been the perspective from which information has been retrieved. As highlighted above, this research explored important factors for expatriate assignment success from the perspective of the employee. Also, data was collected from the accompanying spouse/partner to provide additional information about important factors for organisations to consider when sending an employee and their family abroad. According to Richardson and McKenna (2006), repositioning the individual as the central focus contributes to a more emic perspective and provides a more individually-focussed understanding of the expatriate experience. Therefore, this research contributes to the gap in British expatriation research on these employee perspectives, which helps generate a fuller understanding of expatriation and how to increase the success rates and reduce the failures of expatriate assignments. This included examining relationships with a new conceptualisation of expatriate assignment success that have previously not been explored in research.

The third contribution of the research is the new expatriate personality instrument. The new personality instrument contains a relatively small number of items making it a pragmatic assessment instrument for use in practice. Also, it can better predict some expatriate assignment outcomes than longer pre-existing measures of personality. Although more research is needed on the instrument, initial results are promising and provide some evidence towards the fidelity-bandwidth debate. Very little research has explored the debate within the expatriation context. The present research has provided some insight into the debate. Specifically the results provide some support for the argument that narrow and more specific personality measures are better for predicting certain organisational outcomes. The results contribute to the argument that narrower personality measures have better utility in selection contexts as opposed to broader personality measures. The present research has developed a personality instrument that could be useful for the expatriate selection contexts. Also, given that organisations and practitioners can be reluctant to use personality assessment for expatriate selection because existing measures have been developed and tested on US samples, the empirical evidence derived from this research could provide a useful path for reducing the gap between research and practice within British multinationals who rely on expatriate assignments.

Overall, the research has contributed to a much larger field of important applied research. Expatriate assignments are an important part of today's organisational strategies to be competitive in tough economic times. Successful assignments are important not only for organisations, but there also positive implications for the employee, their family, as well as the industry and economy. Consequently, failures can have significant costs and implications for all the groups. Conducting research in which the findings may help increase the successes and reduce the failures is therefore important. Specifically, the research has built on existing knowledge of British expatriation, which may help address the gap between research and practice in British multinational organisations.

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Appendices

Appendix 1

Study 1: Thematic Analysis Coding – Themes, Definitions and Indicators

The following themes were derived from the data using the below coding system. Each theme was given a brief definition describing what the theme is concerned. Where appropriate, sub-themes were given below the theme that provided a more specified element of the theme. Next to the theme or the sub-theme is a description of the indicators for that theme. If these indicators were mentioned in the data, the data could then be coded under that particular theme. These indicators sometimes included examples and exceptions to the codes in order to improve the clarity and aid coding.

Themes and Sub-Themes	Definition and *Indicator*
1. <u>Individual</u>	Concerns the importance of the individual in the assignment.
▪ Personality Characteristics	*Mentions the importance of the type of person who goes, including specifics characteristics of the person.*
▪ Desire & Interest in Going Abroad	*Mentions that they wanted to go because they were interested in the culture or country, including the reasons for going e.g. personal development or career development.*
2. <u>Spouse/Partner & Family</u>	Concerns the importance of the family and/or spouse/partner in the assignment
▪ Spouse/Partner Personality	*Mentions the importance of the spouses'/partners' personality in the assignment, either if they moved or stayed put.*
▪ Children	*Mentions the importance of children in assignments, including the issues of education and schooling.*
▪ Spouse/Partner & Family Remain in the UK	*Mentions problems or issues of leaving the spouse/partner & family behind, including the issues of commuting.*

3. <u>Language</u>	Concerns the importance of language difficulties when in the host country. *Mentions speaking or issues relating to speaking the host country language as being an important factor when on an expatriate assignment.*
4. <u>Organisational Support</u>	Concerned with the level of support offered by the organisation. *Mentions the importance of support from the company for the employee and their family from either the host company or parent company.*
5. <u>Prior Knowledge</u> ▪ Expectations ▪ Training	Concerns information about the assignment prior to arrival. *Mentions their expectations of the assignments as important, including assignment duration and roles.* *Mentions having taken part in or the importance of taking part in training for the assignment, including recommendations for training.*
6. <u>Networks & Contacts</u> ▪ In-Country ▪ With Home	Concerned with the importance of building networking, socialising and keeping in contact with people. *Mentions the importance of socialising with people in the host country, either host country nationals or other expatriates, and includes the benefits of doing this e.g. language improvement.* *Mentions the importance of having contact with people back from (e.g. family, friends and the company), as well as the methods used to do this.*
7. <u>Culture</u>	Concerned with the importance of recognising the impact of the new culture. *Mentions the importance of culture in expatriate assignments, including similarities and differences between home and host cultures and the difficulties faced.*

8. <u>After the Assignment</u>	Concerned with the importance of what happens after the assignment.
▪ Repatriation	*Mentions coming back from the assignment as an important factor to consider, including issues of lack of perceived value of the assignment.*
▪ Non-Returns	*Mentions employee and their families (if relevant) not returning back home at the end of the assignment, including the reasons why they decide to stay.*
▪ Multiple Assignments	*Mentions potentially going on another assignment, including the reasons for their choice.*
9. <u>Adjustment</u>	Concerned with the experience of adjusting to the new country. *Mentions adjusting to the new culture and country, including the phases and stages associated with the adjustment process.*

Appendix 2

Study 2: Initial Personality Items

The following 123 personality items were generated for the second aim of the thesis. The items are shown in their respective Big Five personality traits and sub-scales.

<u>**Openness to Experience**</u>

Open to New Ideas:

- I believe there are many ways to approach a situation (+)
- If something isn't broke, why fix it? (-)
- If another country is to conduct business with us, then they should learn about our culture (-)
- The way I do things has always worked well for me in the past and should continue to in the future (-)
- I enjoy theoretical discussions about different cultures (+)
- There is always room for improvement at work (+)
- If we are to conduct business with another country, we should be open to 'their' ways of doing things (+)
- Information regarding different cultures is of little importance to me (-)
- I like to listen and learn from others' opinions (+)
- I am comfortable with my own individual way of approaching a situation (-)

Enjoys Learning about New Cultures:

- I am interested in different religions (+)
- I am British; therefore other cultures are of little importance in my life (-)
- I enjoy trying traditional dishes of different countries (+)

- I enjoy visiting and exploring new places (+)
- Everyone is the same; therefore religion is of little importance (-)
- I often think about what it would be like to live and work in a different country (+)
- I prefer to stick to foods that I know (-)
- I am fascinated by the work ethics of different countries (+)

Low Prejudice:

- In most organisations, discrimination between different nationalities is no longer a problem (-)
- Racism is still common in workplaces (+)
- International workers are not treated in the same way as UK workers (+)
- If people choose to live in this country they should live by our culture and religion (-)
- Government money should not be spent on foreign religious and cultural activities (-)
- When compared with a foreign employee, a British citizen would always perform better (-)
- I favour the full integration of foreign employees in the UK (+)
- Foreign workers have poor work ethics (-)
- I think that UK jobs should always be offered to a UK citizen first (-)
- Foreign workers do not have negative views about UK workers (-)
- It is easy to appreciate calls from foreign workers for equal opportunities in the workplace (+)

Extraversion

Cultural Participation:

- I enjoy the excitement of different cultural situations (+)
- I have little desire to explore new places (-)
- I enjoy participating in new social situations (+)
- I prefer to learn about new cultures from books and/or television (-)
- I enjoy engaging in different cultural festivals (+)

Initiates Contact with New People:

- I prefer to stand-back and observe a situation before I join in (-)
- I tend to take the lead in a new situation (+)
- I often feel like people from a different country will not understand me (-)
- Regardless of country, people can always find ways to communicate (+)
- If someone looks interesting, I will go over and talk to them (+)
- I find it easy to talk to new people who are from a different country (+)
- I find it daunting to approach people who are not from this country (-)

Non-British Friendships:

- Most of my friends share my nationality (-)
- A friend from another country could never truly appreciate my perspective (+)
- I have many friends who do not share my nationality (+)
- Having a friend from another country requires a lot of patience and effort (-)
- Forming a relationship with someone from another country is not difficult (+)
- Friends are friends regardless of their nationality (+)
- The closest friendships are always with people who share your nationality (-)

Agreeableness

Dislikes Confrontation:

- I like to speak my mind, even if people do not like it (-)
- I avoid situations where confrontation may arise (+)
- I like people from all countries to feel relaxed around me (+)
- Confrontation is how we learn from each other (-)
- I would rather compromise than argue (+)
- I don't mind if I do not get along with people (-)
- When a confrontation arises at work, I will usually back down (+)
- I always strive to cooperate with others (+)
- I like people to be wary of me (-)
- I am friends with almost everyone I know (+)

Empathic to New Cultures:

- I find it easy to see how different cultures could improve (-)
- Cultural differences are a good thing (+)
- I see little value in placing myself in the shoes of someone from a different culture (-)
- I like to try and put myself in the shoes of someone from a different culture (+)
- All countries have similar ways of doing things (-)
- I see my own culture as different from others rather than better or worse (+)
- Things would be better if cultural differences were minimised (-)
- Cultural differences are only natural (+)

Trusting:

- I would not consider it rude if I did not receive a handshake from someone from a different country (+)
- I think it is healthy to be sceptical of people from different countries and cultures (-)
- I believe people from different countries are generally trustworthy (+)
- I would be comfortable asking advice from someone from a different country (+)
- I would be likely to get an honest answer from someone who shares my nationality (-)
- When visiting a new country, the locals are always the best source of reliable
- information (+)

<u>**Conscientiousness**</u>

Organised Preparation:

- I prefer to research a destination thoroughly before visiting (+)
- I can work without preparation (-)
- I prefer to go with the flow (-)
- I always plan ahead (+)
- Knowing when and where you are going is the only information you really need when travelling (-)
- I believe many unforeseen events are likely when travelling in a new country (-)
- There is no better way of learning about a new place than discovering it on your own (-)

- Whenever I travel I try to arrange to have a local contact (+)
- I prefer the surprises of a new country (-)
- I make plans and then follow them (+)
- People often say I am disorganised (-)
- I try to anticipate what new places will be like (+)

Follow Cultural Rules and Norms:

- I always try to maintain my national identity (-)
- I make a point of following social norms and traditions when in a different cultural environment (+)
- I like to understand culturally specific behaviour (+)
- Sometimes, it is appropriate to conform to different cultural behaviours and traditions (+)
- When in the company of others, my nationality is a crucial part of my identity (-)
- I like to fit in with the locals when I am in another country (+)
- I like to stand out from a cross-cultural crowd (-)

Self-Efficacy:

- I believe I can learn what is necessary in order to be successful in a new country (+)
- Problems that arise in a different country would be difficult to solve (+)
- I'm confident that I would get along with people from another country (+)
- Cross-cultural situations tend to be confusing (-)
- I do not know if I could live happily in a different country (-)
- I will be able to deal with problems that might arise in a different country (+)

Emotional Stability

At Ease in New Situations:

- Novel situations often overwhelm me (-)
- I tend to stay calm in unfamiliar situations (+)
- I can adapt easily to a new situation (+)
- I am able to put things in perspective when faced with a novel situation (+)
- I am slightly apprehensive about new cultural experiences (-)
- New situations make me feel uneasy (-)
- I sometimes feel anxious when in a new situation (-)
- It does not worry me about being in a new cultural situation (+)

Coping:

- Cultural differences rarely cause me stress (+)
- I would be very anxious about working in a new country (-)
- I can generally cope well under pressure (+)
- Living in a different culture would be a stressful experience (-)
- I would not be worried about working in a different country (+)
- New cultural experiences tend to make me feel tense (-)

Low Negative Affectivity:

- When I get upset about something, I usually calm down quite quickly (+)
- I feel guilty when I do not understand someone from another culture (-)
- I always look for the positives in any situation (+)
- I tend to get annoyed when I cannot understand someone (-)
- I do not get irritated if I have difficulty communicating with someone (+)

- When something bad happens to me, I tend to get very sad (-)
- Difficult projects do not worry me (+)
- I get outraged when people are rude (-)
- I am not easily bothered when things go wrong (+)
- I experience frequent mood swings (-)
- I remain patient when I find it difficult to understand someone from another culture (+)
- I find that I tend to focus on the negatives in most situations (-)

Appendix 3

Item Assignment Exercise

Below are the names and definitions of 3 related scales that have been developed in my PhD. Forty-two items that make up these scales are presented in the table below the definitions. The items are both positively (+) and negatively keyed (-). This exercise requires you to assign each item to a particular factor (1, 2 or 3). If you cannot assign an item, or think it does not reflect any of the scale definitions, please use a question mark (?) to highlight this. Place your decision in the box next to the item in the table below.

Factor 1. Inter-Cultural Openness

Definition: This scale is associated with being open and unprejudiced to new cultures and people of different cultures. Individuals who score high on this scale do not view people from other cultures as inferior because they are not from the UK and are happy to have friendship with people who are of a different nationality and feel comfortable speaking to someone who is a not a native to the UK. Individuals who score low on this scale hold prejudiced view on people from different cultures, perceiving them to be different and unequal in the UK.

Factor 2. Cultural Apprehension

Definition: This scale is associated with being anxious and apprehensive about new cultural experiences. Individuals who score high on this scale do not worry or feel tense about being in a new cultural environment. Individuals who score low on the scale feel nervous about being in a different culture or country, and can sometimes be overwhelmed in these novel situations.

Factor 3. Cross-Cultural Disinterest

Definition: This factor is associated with an individual having little interested in or excited by new cultures, which includes not engaging in and discussing different cultures. Individuals who score high on this scale do not take part in different cultural activities and are not interested in understanding the perspective of someone form a different culture or their beliefs, such as their religion. People who score low on this scale enjoy engaging in and are excited about being in a different culture.

Items To Assign

When compared with a foreign employee, a British citizen would always perform better (-)	
I would not be worried about working in a different country (+)	
I favour the full integration of foreign employees in the UK (+)	
I would be comfortable asking advice from someone from a different country (+)	
I see my own culture as different from others rather than better or worse (+)	
I am slightly apprehensive about new cultural experiences (-)	
I am interested in different religions (+)	
I enjoy the excitement of different cultural situations (+)	
If we are to conduct business with another country, we should be open to 'their' ways of doing things (+)	
I am fascinated by the work ethics of different countries (+)	
I enjoy participating in new social situations (+)	
If people choose to live in this country they should live by our culture and religion (-)	
Having a friend from another country requires a lot of patience and effort (-)	
I like to try and put myself in the shoes of someone from a different culture (+)	
I enjoy theoretical discussions about different cultures (+)	
I think that UK jobs should always be offered to a UK citizen first (-)	
Sometimes, it is appropriate to conform to different cultural behaviours and traditions (+)	

cont. Items To Assign

Friends are friends regardless of their nationality (+)	
Living in a different culture would be a stressful experience (-)	
Foreign workers have poor work ethics (-)	
I like people from all countries to feel relaxed around me (+)	
I'm confident that I would get along with people from another country (+)	
I would be very anxious about working in a new country (-)	
It is easy to appreciate calls from foreign workers for equal opportunities in the workplace (+)	
The closest friendships are always with people who share your nationality (-)	
New cultural experiences tend to make me feel tense (-)	
It does not worry me about being in a new cultural situation (+)	
Regardless of country, people can always find ways to communicate (+)	
Novel situations often overwhelm me (-)	
I enjoy engaging in different cultural festivals (+)	
Government money should not be spent on foreign religious and cultural activities (-)	
New situations make me feel uneasy (-)	
I like people to be wary of me (-)	

Appendix 4

Study 3: Qualitative research questions posed to expatriates (current and repatriated) and accompanying spouses/partners.

Variable	Sample	Question
Training	Expatriate	"What kind of training did/do you receive? Please state if this was pre-assignment or during assignment, and do you expect to receive any post assignment?" "Do you think training is an important part of moving overseas?" (Yes or No response) "If YES, why and what type of training do you think should be provided? Is there training that should be available for every expatriate? If NO, why not?"
	Repatriate	"What kind of training did you receive? Please state if this was pre-assignment, during assignment, or post assignment." "Do you think training is an important part of moving overseas?" "If YES, why and what type of training do you think should be provided? Is there training that should be available for every expatriate? If NO, why not?"
Support	Expatriate	"What, if any, additional support do you feel you would have benefited the assignment for you? "
	Repatriate	"What, if any, additional support do you feel you would have benefited the assignment for you? "
Expectations	Expatriate	"Do you think having expectations before leaving the UK has influenced your assignment success? Please explain your answer. "Is there anything an organisation could do to help manage expectations? Please explain your answer."
	Repatriate	"Do you think having expectations before leaving the UK influenced your assignment success? Please explain your answer." "Is there anything an organisation could do to help manage expectations? Please explain your answer."

Language	Expatriate Repatriate	"Do you find the language of the host country a problem for you living and working in the host country? Please explain your answer." "With regards to language, is there anything that an organisation could/should do when sending an employee overseas? Please explain your answer." "Did you find the language of the host country a problem for you living and working in that country? Please explain your answer." "With regards to language, is there anything that an organisation could/should do when sending an employee overseas? Please explain your answer."
Family	Expatriate & Repatriate: Family did not relocate with you Family relocated with you Expatriate Spouse Repatriate Spouse	"If your partner/spouse (and children) did not accompany you on the assignment, are there any important issues relating to this that you think need to be considered by an organisation? Please explain your answer." "If you have your partner/spouse (and children) with you on the assignment, are there any important issues relating to them that you think need to be considered by an organisation? Please explain your answer." "Are there any important issues relating to you and your family that you think need to be considered by an organisation? Please explain your answer." "Were there any important issues relating to you and your family that you think need to be considered by an organisation? Please explain your answer."
Other Issues	Expatriate & Repatriate Expatriate & Repatriate Spouse	"Do you think there are anymore important issues that a company should be aware of when sending employees and (their families) overseas? Please explain." "Do you think there are any more important issues that a company should be aware of when sending employees and (their families) overseas? Please explain."

Reason for leaving early	Repatriate Repatriate Spouse	"If you left the assignment early or felt that you had left before you had completed what you went out to do, would you mind providing a reason why you left? Remember, the information you provide will be kept completely confidential." "If you returned to the UK early or left before your partner had completed what they went out to do, would you mind providing a reason why you left? "

Appendix 5

Study 3: Results of TA for employee responses to qualitative questions

Theme/Category	Theme/Sub-theme	Indicator
Language Question 1: Do/did you find the language of the host country a problem for you living and working in the host country? Please explain your answer.		
1) No	**English mainly spoken**	Mentions that English was spoken by many people, including expat communities.
	Spoke host-country language	Mentions could speak to the host country language or had someone close to them could speak the language.
2) Yes	**Challenging communication**	Mentions host country language was a problem because not speaking it caused difficulties, and feelings of embarrassment for themselves and their family.
3) Sometimes	**Outside work issues**	Mentions that they occasionally had language issues outside of work but not inside of work.
	Inside work issues	Mentions that they occasionally had language issues inside of work but not outside of work.
	Time	Mentions the relevance of time for learning a language.
Question 2: With regards to language, is there anything that an organisation could/should do when sending an employee overseas? Please explain your answer.		
1) Training		Mentions the importance of providing training for employees and family members, before and/or during the assignment.
Organisational Support: What, if any, additional support do you feel you would have benefited the assignment for you? Please feel free to make these at detailed as you feel comfortable to do so.		
1) Information and advice		Mentions importance of providing information and advice on various issues, including setting up a new life.

2) Local contact			Mentions need for a contact in the host country.
3) Family			Concerned with providing support from the expatriate's family throughout the assignment, including help with networking.
4) Communication with the UK			Mentions the importance of communicating with the UK.
Training: Do you think training is an important part of moving overseas? If YES, why and what type of training do you think should be provided? Is there training that should be available for every expatriate? If NO, why not?			
1) Yes		Culture training	Concerned with differences between cultures, mentioning the importance of providing information and awareness training both for employee and family before and during the assignment. Also includes practical differences, around living in a different country/culture and way things are done e.g. financial, driving.
		Language training	Concerned with language issues in work and outside of work, both for employee and family.
		Job-related training	Concerned with training related to the role or host organisation, including the importance of knowing how business is done.
	2) No	Not necessary	Mentioned similar role or already experienced or familiar with culture.
		Can't train	Mentioned view that can't be trained, it is more the experience
		Right person	Mentioned the importance of the person, which is something that training cannot change

3) Depends	Relevance	Mentioned importance of considering role, country and person as to whether training is important or relevant

Expectations
Question 1:
Do you think having expectations before leaving the UK has influenced your assignment success? Please explain your answer.

1) No influence	**Expectations not met**	Mentions expectations were not met, or only partially met.
	More important to be open	Highlights the importance of being open and flexible, and not having expectations.
	Had no expectations	Mentions had no expectations.
2) Yes influenced	**Help prepare**	Mentions having expectations helps prepare and plan for the assignment.
	Give confidence	Mentions that having expectations helps employee feel more confident and aware of what is going on.

Question 2:
Is there anything an organisation could do to help manage expectations? Please explain your answer.

1) Organisations can help management expectations	**Provide more information**	Mentions providing information and/or training on various aspects of host country and culture.
	More contacts and communication	Mentions organisations could communicate more with expat and help facilitate contacts in host country.
	Pre-assignment visits	Mentions organisation providing visits or trials to host country.

2) Organisation cannot manage expectations	Mentions that organisations cannot manage expectations because assignment and/or individual is too specific and different.

Family Issues
Situation 1:
If your partner/spouse (and children) did not accompany you on the assignment, are there any important issues relating to this that you think need to be considered by an organisation? Please explain your answer.

1) More allowances	Mentions providing more facilities, including flights for family members, more holidays to see family, and helping with communicating back home.

Situation 2:
If you have/had your partner/spouse (and children) with you on the assignment, are there any important issues relating to them that you think need to be considered by an organisation? Please explain your answer.

1) Child issues	Mentions importance of considering expatriate's children and providing appropriate childcare and facilities, including schooling.
2) Partner/Spouse issues	Mentions the importance of considering expatriate's accompanying spouse/partner, including the importance of networking and their career.
3) Prior information and support	Mentions the importance of providing information and support in general, including the provision of medical care, helping to find accommodation, and integrating into the host culture.
4) Time	Mentions allowing the expatriate and their family to have enough time to prepare and settle into the host country.

Other Issues: Do you think there are any more important issues that a company should be aware of when sending employees and (their families) overseas? Please explain.	
1) Budgets and allowances	Mentions the importance of considering the financial aspects involved in the assignment, including allowing flexibility with allowances and not changing the terms of the agreement.
2) Repatriation	Mentions the importance of considering what will happen after the assignment and the repatriation process.
3) Single employees	Mentions the importance of considering single employees' circumstances and needs as they are different and more isolating than employees with families.
4) Assessment	Highlights the need to assess the suitability of employees and their family for an assignment, including having health assessments during the assignment.

Appendix 6

Study 3: Results of thematic analysis for accompanying spouse/partner responses to qualitative questions

Theme	Sub-theme	Indicator
Family issues. Are there any important issues relating to you and your family that you think need to be considered by an organisation? Please explain your answer.		
1) Children		Mentions the importance of helping with issues relating to children, including schooling and any special requirements they may have.
2) Networks and socialising		Mentions helping family networking and involvement with activities in the host country, including the provision of information.
3) Cultural differences and difficulties		Highlights the importance of understanding and appreciating the difficulties of trying to live and adapt to a new country, including the importance of providing any support or training.
Other issues Do you think there are any more important issues that a company should be aware of when sending employees and (their families) overseas? Please explain.		
1) More help		Mentions the importance of providing much more help and being fully organised for the move, including practical issues such as housing and schools.
2) More visits and assessments		Highlights the importance of allowing employees and their family to have visits to the host location and back home, as well as having assessments of the family for their appropriateness to go abroad, including marital and relationship security.