Factors influencing expatriates’ ability to cross-culturally adjust

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Factors influencing expatriates’ ability to cross-culturally adjust

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Supervisor: Prof. D. M. Berry

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DECLARATION

In accordance with Rule G4.6.3, I, Anjuli Hesse (210042540), hereby declare that the treatise for the qualification of a Master of Labour Relations and Human Resources is my own work that it has not previously been submitted for assessment or completion of any postgraduate qualification to another University or for another qualification.

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ABSTRACT

Globalisation has led to an increasing growth of world trade which has directed business all over the world to become increasingly international and increased the number and power of multinational companies. These expatriates are confronted with societal norms different from their home cultures. This study investigated which factors influence cross-cultural adjustment the most and which factors are perceived by the expatriates to influence cross-cultural adjustment.

Based on the literature review four different categories of factors influencing cross-cultural adjustment were identified (Individual, organisational, work-related and non-work related factors)

A self-administered online questionnaire, based on existing questionnaires (Black’s (1988) cross-cultural adjustment questionnaire) and literature research, was developed in order to detect a relationship between factors and one of the three adjustment types (general, interaction and work) and to reveal the perceived importance of the factors.

In this study all identified factors were perceived to be important for cross-cultural adjustment. However, language skills and spousal adjustment were perceived to be the most important factors and had indeed the strongest correlation towards cross-cultural adjustment.

Based on the findings of this research project, recommendations for organisations and expatriates have been provided.

Key words: Cross-cultural adjustment, expatriates, influential factors on adjustment
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<td>HR</td>
<td>Human Resources</td>
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<tr>
<td>No/n</td>
<td>Number</td>
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<tr>
<td>POS</td>
<td>Perceived organisational support</td>
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<td>r</td>
<td>Pearson's r correlation coefficient</td>
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<tr>
<td>RBV</td>
<td>Resourced based view</td>
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<tr>
<td>SD</td>
<td>Standard deviation</td>
</tr>
<tr>
<td>SHRM</td>
<td>Strategic Human Resource Management</td>
</tr>
<tr>
<td>UAE</td>
<td>United Arab Emirates</td>
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<td>USA</td>
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# CHAPTER 1:
INTRODUCTION, PROBLEM STATEMENT AND OUTLINE OF THE RESEARCH PROJECT

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CHAPTER 1:
INTRODUCTION, PROBLEM STATEMENT AND OUTLINE OF THE RESEARCH PROJECT

1.1 Introduction

Globalisation has led to an increasing growth of world trade which has directed business all over the world to become increasingly international and increased the number and power of multinational companies (Andreason, 2002, p. 21; Ching-Hsiang & Hung-Wen, 2008, p. 176; Torres, 2001, p. 76). Therefore, it is imperative for multinational companies to attract, select, develop and retain employees who can live and work effectively outside of their own national borders (Adler & Bartholomew, 1992, p. 53; Black, Gregersen & Mendenhall, 1992, p. 59; Caligiuri, 2000a, p. 61-63). Additionally, global human resource practices, transferring employees from country to country in particular, were found to be the most effective means to transfer critical capabilities (Conn & Yip, 1997, p. 25). In order to be able to effectively compete against major global competitors international firms need managers who are able to adjust to a new culture in the international marketplace (Selmer, 1999, p. 80). However, expatriates have their own cultural heritage which will come into contact with the host country culture. These cultural differences may lead to problems and could be one of the reasons for the often reported failures of expatriates on international assignments (Forster, 1997, p. 420). Therefore, managers and employees who have the ability to adjust quickly and have intercultural competences will hold a competitive advantage.

However, the outstandingly high failure rate of assignments has not notably improved over the last decade while at the same time more employees are being sent abroad by their organisations (Forstenlechner, 2010, p. 180; Tharenou, 2008, p. 185-187). This shows a need for more research in this area and is particularly necessary as according to Selmer (1999, p. 77) the cost for each expatriate failure ranges between US $150,000 to US $200,000. Additionally, real cost of an unsuccessful international expatriate will extend beyond the monetary expenses
since this failure will have a negative impact on future interactions between the company and the host country (Caligiuri, 2000a, p. 76-80).

Yet, organisations still undertake international assignments in order to transfer knowledge. This refers especially to the company’s ability to move information, understanding and knowledge from one country to another (Brewster, Carey, Grobler, Holland & Wärnich, 2008, p. 291). Knowledge transfer is essential in terms of the resourced based view (RBV). The RBV however is based on the perspective that the internal environment is more critical to the determination of strategic action than the external environment (Barney, 1991). Therefore, this approach suggests that Human Resources (HR) and expatriates contribute to a constant competitive advantage by supervising the development of competencies (Brewster et al., 2008, p. 35). This approach focuses not only on the behaviour of employees but as well on the skills, knowledge, attitudes and competencies which have sustained more impact on long-term success than current behaviour (Torrington, Hall & Taylor, 2002, p. 317). The central theme emerging in the strategic human resource management (SHRM) resource-based literature is that privately held knowledge is a basic source of advantage in competition. Thus, business excellence is about the intellectual capital and business intelligence to anticipate the future (Barney, 1991). Therefore, if a company extends its business in an international market it is essential that the knowledge, skills and competencies are well transferred.

However, as Brewster and his colleagues (2008, p. 291) state there are additional reasons for a company to send managers abroad, such as:

- “To enhance the control of the centre
- To underline the importance of the country to the local government
- To provide skills not existing in that geographical location
- To provide opportunities for management development
- To internationalise the managerial cadre”
1.2 Theoretical framework

Brewster et al (2008, p. 294) state that the expatriates’ cycle includes selection, training and development programmes, adjustment, pay and rewards, performance measurement and management, and finally, repatriation. The research conducted in terms of the different stages of the cycle will be discussed in chapter two.

The U-curve theory of adjustment focuses on cross-cultural adjustment (Ching-Hsiang, & Hung-Wen, 2008, p. 182). This theory discusses four stages of adjustment. The honeymoon stage arises within the first weeks after arrival in the host country. Expatriates are fascinated and are at first elated to be in a new culture (Xia, 2009, p. 92). This stage might lead expatriates to enthusiastically work 12 hours a day, which then can result in a drain on emotional energy. This can lead to lack of sleep, tiredness, irritability, and loss of appetite (Bennett, 1994). The second stage is referred to as culture shock. The expatriate is immersed in new problems: housing, transportation, food, language, and new friends. Fatigue may result from continuously trying to comprehend and use the foreign language. Typical symptoms of this stage are frustration and hostility towards the host nation and its people (Caligiuri, Phillips, Lazarova, Tarique & Buergi, 2001, p. 360). The adjustment stage begins, when the individual progressively adapts to the new norms and values of the host country and is able to act appropriately in the new culture. Lastly, the mastery stage occurs, when the individual is able to function effectively in the new culture (Ching-Hsiang, & Hung-Wen, 2008, p. 183).

1.3 Problem Statement

Due to the already mentioned high failure rate of expatriates there is a need for research on how to improve the success rate of expatriates. This is essential for two reasons. Firstly, companies lose an enormous amount of money through a failed foreign assignment (Selmer, 1999). Secondly, as Andreason (2002, p. 21) states, the cost for the individual expatriate could includes a “loss of self-esteem, self-confidence and prestige among their peers”.


However, the personal inability to adjust in the new culture is the main reason for failing foreign assignments (Morley et al., 2004, p. 204). Therefore, it should be seen as more than only a matter of psychological well-being in a foreign country, since adjustment is a significant antecedent to the success of an international assignment (Aryee & Stone, 1996; Toh & DeNisis, 2007). Additionally, expatriates have to deal with a double burden, since they are expected to transfer knowledge, but as well are required to adapt to a new culture. Thus they are expected to learn and teach at the same time which can lead to an extreme stress factor (Bonache & Fernandez, 2004).

Therefore, this study aims to answer the questions

**Which factors are critical for expatriates to succeed in their (foreign) assignments through cross-cultural adjustment?**

**1.3.1 Sub-problems**

A critical inspection of the main question lead to the discovery of the following sub-problems:

**Sub-problem 1**

To what extent do personal factors affect the expatriates' success to fully cross-culturally adjust?

**Sub-problem 2**
To what extent do organisational factors affect the expatriates' success to cross-culturally adjust?

Sub-problem 3

To what extent do job related variables influence the expatriates' success to cross-culturally adjust?

Sub-problem 4

To what extent do non-work related factors influence the expatriates' success to cross-culturally adjust?

Sub-problem 5

What factors expatriates perceive to be the most important for cross-cultural adjustment?

1.4 Demarcation of the study

The reasoning behind demarcating research is to allow research to be more focused and manageable. Nevertheless, the omission of certain areas does not imply that there is no need to research excluded areas. The problem statement provides a clear indication of what is included in the research.

1.4.1 Participations demarcation

The questionnaires of this study were answered by expatriates who are members of the social business network XING. The participants are members of various XING groups such as international HR transfer in Europe and around the world, Europeans working outside of Europe and the Expats club.

1.5 Definition of selected concepts

The following concepts are essential for this research paper. In order to prevent different interpretations of the concepts, a brief explanation is given below.
1.5.1 Organisational vs. national culture

National culture is defined as “the collective programming of the mind which distinguishes the members of one group or people from another” (Hofstede, 2001, p. 5). He states that mental programming includes shared values, beliefs, assumptions, expectations, perceptions and behaviour. In other words, national culture is “everything that people have, think and do as members of society” (Robbins & Judge, 2009, p. 24). There are different frameworks dealing with the differences among various cultures. Famous examples are Kluckhohn and Strodtbeck’s Variations in Values Orientations, Hofstede’s Dimensions of Cultural Values, Schwartz’s Value Survey, Trompenaars’ Dimensions of Culture and Hall’s High-Context and Low-Context Cultural Framework (Francesco & Gold, 2005, p. 25-35). Although, there are various frameworks, all of them are based on the assumption that national cultural values are learned early, held deeply and change slowly over the course of generations.

However, organisational culture is based on collective, governed rules through which an organisation functions. The ways an individual operates within the context of the organisation is based on its culture. How a group or individual behaves defines what is normal is determined by his or her culture (Kahn, 2005, p.4). Although there have been various definitions of organisational culture, almost all authors agree, that it is forms a “system of shared assumptions held by members which distinguishes one organisation from others” (Werner, 2007, p. 25).

The interplay between organisational and national culture has been debated a lot in the literature and all major studies of national culture (Hofstede, Trompenaars, GLOBE project) find national culture dimensions meaningful to business (Hill, 2010; Hofstede, 2001). Therefore, multinational firms need to choose whether to follow an ethnocentric or polycentric approach when dealing with a new cultural work environment. However, Hofstede (1999) comes to the conclusion that management practice and other organisational and contextual factors shape organisational cultures. Therefore organisational cultures are manageable as opposed to national cultures, which are based on values, hardly changeable and evolve during time.
However, the focus on the central role of national culture in terms of management has continued. The most famous example would be the large scale project GLOBE, which a research project studying cross-cultural leadership differences and similarities (House, Hanges, Javidan, Dorman & Gupta, 2004). The underpinning theory in the GLOBE study is that “leadership effectiveness perceptions derive from Culturally-implicit Leadership Theories (CLTs) that are, in turn, based on the cultural values and practices present in each society” (Ashkanasy, 2002, p. 159).

Organisations need to understand how national factors affect competitive advantage, and then they can identify where their competitors come from and where they need to locate for specific production activities (Porter, 1990, p. 71).

### 1.5.2 Expatriates

Expatriates are individuals living in a country other than the one in which they hold their primary citizenship. With the expansion of global economy the level of expatriation has increased notably (Antal, 2000, p. 33; Richardson & McKenna, 2006, p. 7). Furthermore, due to the increasing international mobility more managers and corporate executives will experience expatriation in their working lives (Richardson & McKenna, 2006, p.7). In a survey Oddou and Mendenhall (1991) found that 90 per cent of expatriates reported that their global perspectives improved, 80 per cent reported an increase in effective communication with people from different cultural backgrounds and 80 per cent were better able to comprehend business trends.

Black and Gregersen (1992, p. 62) differ between 4 different types of allegiance to home and host organisation (or country when dealing with self-initiated expatriates) for expatriates (see Figure 1.1). Finally, a distinction must be drawn between self-initiated expatriates and assigned expatriates. Self-initiated expatriates have chosen to seek an overseas position autonomously (Richardson & Mc Kenna, 2006, p. 7).

In conclusion, in this research paper, expatriates are broadly defined as:

**Highly educated individuals living and working in a foreign country**
1.5.3 Cross-cultural adjustment

Adjustment is “the re-establishment of routines that provide valued outcomes and feelings of control that are predictable” (Morley et al., 2004, p. 205). For expatriates it is to the degree to which they feel secure and comfortable while living and working in their host country (Caligiuri, 2000a, p. 63). There are four different approaches to adjustment: Integration, separation, assimilation, and marginalisation (Ward & Rana-Deuba. 1999, p. 423). From the organisation’s perspective the degree of adjustment of the expatriate is a significant predictor of employee performance and completion of the mission. From the expatriate perspective adjustment is a determining factor for job satisfaction and psychological well-being (Aryee & Stone, 1996).

Many factors have been identified influencing the expatriates’ ability to culturally adjust:

- Individual factors include flexibility, desire to adjust, tolerance of ambiguity, leadership qualities, interpersonal skills and self-confidence, cultural
empathy, emotional stability (Morley et al., 2004, p. 206), previous overseas experience, ability to speak the language and personal characteristics (Caligiuri, 2000a).

- Organisational factors include pre-departure preparation (cross-cultural training), organisations’ selection criteria, organisational support and differences within the organisations (Andreason, 2002, p. 21-22, Beitler, 2005; Black & Gregersen, 1992; Harris & Brewster, 2004)

- Job factors refer to role novelty, role clarity, role discretion, role conflict and overload (Caligiuri, 2000a; Morley et al., 2004, p. 207).

- Non-work characteristics consist of cultural novelty, social support and family adjustment (De Matteo & Russell, 2000).

Two main theories have been used to understand the process of cross-cultural adjustment: Stress theories (Caligiuri & Lazarova, 2002) and the social learning theory (Chang, 1996). Both will be discussed in more detail in the second chapter.

1.6 Reasons for and importance of the research

Although there are many factors influencing the success of expatriates’ assignments, such as training, compensation, selection etc. many researchers believe that the most important work to ensuring success can be done after the arrival (Vance & Paik, 2006, p. 255). Hence, researching the adjustment process will not only help companies, neither expatriates. The fact that there are currently 850,000 subsidiaries of multinational corporations operating globally (Harvey & Moeller, 2009, p. 280) makes research in that area even more significant. A failure to adjust in the long term will lead to a constant culture shock (Xia, 2009). A culture shock has a negative impact on individual psychology and often includes a large and diverse set of symptoms. The major symptoms may be described as depression, anxiety and feelings of helplessness (Mio, 1999). Additionally, an individual who is exposed to a stressful environment can suffer from insomnia, irritability, depression, headaches and psychosomatic illnesses. Those factors can lead to tension, exhaustion and fretfulness. The disability to adjust in a new cultural environment will lead to such an environment. Long-term exposure to such an environment can lead to neurotic anxiety (Lewis, 1997, p. 281). Furthermore, research has observed that expatriates inability to adjust can
lead to an increase in alcohol, drug abuse and smoking, which in turn can lead to absenteeism, discipline problems and reduced effectiveness at work (Roberson, 1986, p. 51).

Therefore, this research can be used to prevent a culture shock for the individual and improve the quality of their foreign assignment. Further, an expatriate who has the ability to culturally adjust will increase his or her value for the company and will save a company money. Additionally, this study focuses on a number of factors which influence adjustment (see Figure 2.1), whereas others studies only focus on one or two factors.

1.7 Objectives of the study

The purpose of the research was to develop an integrated model of cross-cultural adjustment strategies. More specifically, the objectives of this research are to:

- To identify critical factors which hinder cross-cultural adjustment
- To identify factors which abet cross-cultural adjustment
- To identify to what extent organisational factors influence cross-cultural adjustment in terms of organisational culture and management styles
- To identify to what extent the cultural distance between own and foreign culture abets or hinder cross-cultural adjustment.
- To identify the perceived importance of the identified factors
- To make recommendations for individuals and companies pointing out the critical factors

1.8 Research design

This section describes the specific strategies and methodology that were used for data collection and analysis in order to address the main problem of the study. In order to address the main problem and sub-problems following procedures were adopted:
A systematic literature study was conducted to explore what research reveals around expatriates’ success in general and cross-cultural adjustment in particular.

An empirical study consisting of a questionnaire was conducted among former and contemporary expatriates. The questionnaire was used to establish which factors are the most influential to expatriates success and cross-cultural adjustment. The questionnaire was developed based on existing questionnaires and literature researched for this study. The questionnaire identified the perceived importance of factors influencing cross-cultural adjustment; the expatriates’ own culture and host country culture and the degree of cross-cultural adjustment.

The results of the literature study were combined with the results of the empirical study to develop strategies for cross-cultural adjustment that can be used by expatriates.

1.9 Outline of the research paper

The research paper includes the following chapters:

Chapter 1  Introduction, problem statement, definition of key terms and the outline of the study
Chapter 2 Factors influencing expatriate’s ability to cross-culturally adjust
Chapter 3  Research design
Chapter 4 Analysis, interpretation and discussion of research results
Chapter 5:  Summary, conclusions and recommendations

1.10 Concluding remarks

The aim of this chapter was to clearly identify the problems to be addressed in this research project and to provide a concise explanation of how the researcher aims to solve these problems. The remaining chapters aim at addressing the main and sub-problems.
# CHAPTER 2:
FACTORS INFLUENCING EXPATRIATE'S ABILITY TO CROSS-CULTURALLY ADJUST

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CHAPTER 2:
FACTORS INFLUENCING EXPATRIATE’S ABILITY TO CROSS-CULTURALLY ADJUST

2.1 Introduction

This chapter sought to give a literature overview about the research which has been conducted in respect to expatriates’ ability to cross-culturally adjust. This chapter was written based on the assumption that cross-cultural adjustment is a critical factor for the success of a foreign assignment. Most measures of success and/or failure in expatriate assignments are based on whether or not the expatriates return early to their home country. However, there are other indicators of failure, which are usually not considered. For example, an expatriate might return at the end of the assignment but the assignment could nevertheless be considered unsuccessful for the following possible reasons: Delayed productivity and start-up time, disruption of the relationship between the expatriate and host nationals, damage to the company’s image, lost opportunities and problematic repatriation, resulting in high turnover rates (Bennett, Aston & Colquhoun, 2000, p. 239). Additionally, there are indicators of success besides the completion of the assignment. One important example is the performance of the assignment. This is essential since firstly, not all maladjusted expatriates leave the assignment and secondly, when staying in the country half of the expatriates might be ineffective (Caligiuri, 1997, p. 121). Caligiuri (1997) proposes to consider the degree of cross-cultural adjustment as a success factor.

Nevertheless, research suggests that cross-cultural adjustment is the key determinant of expatriate’s success (Andreason, 2002; Beitler, 2005; Black, Gregersen & Mendenhall, 1992; Black, 1988; Caligiuri, 2000a & b; Harris & Brewster, 2004; Morley et al., 2004). Therefore, this chapter aimed to describe the anticipated factors of cross-cultural adjustment. These factors are separated into four categories:

- Individual factors
- Organisational factors
2. Job factors

Although this differentiation is based on the model proposed by Black and his colleagues (1991 & 1992) there are new factors incorporated based on more recent research by various researchers. At the end of this chapter a model is proposed summarising the factors, which influence cross-cultural adjustment (Figure 2.2). This model does not weight the factors since there is not a school of thoughts which factors are the most relevant ones. However, this research paper aimed to investigate the perceived importance of the different factors.

2.2 Cross-cultural adjustment

The literature on cross-cultural adjustment draws a distinction between psychosocial and socio-cultural adjustment. Socio-cultural adjustment refers to culture-specific skills, such as general intercultural competences or the ability to negotiate in the host culture. Everyday situations must be managed by the expatriates. The successfulness of this can depend, for example, on the cultural distance between the home and the host culture, the ability to speak the host country language, cultural knowledge and interactions with members of the host society (Ward & Kennedy, 1996).

Psychological adjustment relates to subjective well-being or emotional satisfaction. It is therefore also connected to the attitudes of the expatriate and influenced, for example, by the expatriates personality and social support. Hence, in order to adjust psychologically attitudinal change must be achieved whereas for socio-cultural adjustment behavioural changes must occur (Selmer, 1998).

However, adjustment is generally considered to be a process by which a foreigner becomes comfortable with living and working in a host country (Harrison, Shaffer & Bhaskar-Shrinivas, 2004).

Early research regarded adjustment as a one-dimensional concept (Lysgaard, 1955; Oberg, 1960). However, Black and his colleagues (Black, 1988; Black & Gregersen, 1992; Black, Mendenhall & Oddou, 1991) have proposed a three dimensional view of expatriate adjustment.
o Work adjustment
o Interaction adjustment
o General living adjustment

Work adjustment refers to job responsibilities, supervision and performance expectations. It is seen as the easiest of the three dimensions to adjust to, since it is aided by similarities in procedures, policies and requirements of the foreign and parent company (Black et al., 1992).

Interaction adjustment deals with the process of adapting to socialising and speaking with nationals of the host country. This adjustment is seen as the most difficult one. In contact with the people from the host-country different perceptions, beliefs and values emerge hence it is most likely that those differences lead to misunderstandings and conflicts. This in turn can lead to anxiety, anger and depression, which will hinder adjustment (Chang, 1996, p. 151).

Finally, general living adjustment arrangement to general living conditions, culture of the foreign country and logistic issues (Black, 1988). Recently, researchers have renamed the general adjustment facet as cultural adjustment “to better reflect the variable’s reference to host-country cultural conditions” (Harrison & Shaffer, 2005, p. 1457).

However, these three types of cross-cultural adjustment have been operationalized (Black & Stephens, 1989), and consistently validated. Additionally, several studies have investigated predictors of expatriates’ cross-cultural adjustment (Shaffer, Harrison & Gilley, 1999).

2.2.1 Theories of adjustment

Two main theories have been used to understand the process of cross-cultural adjustment: Stress theories (Caligiuri & Lazarova, 2002) and the social learning theory (Chang, 1996).

Based on the amount of uncertainty an expatriate experiences (new role, new culture, new facility etc.) stress theories argue that this uncertainty will increase the stress for expatriates and this will hinder adjustment (Black et al., 1991).
Stress theories especially highlight the role of social support in helping individuals, which reduces uncertainty in novel situations (Ashford & Taylor, 1990). In terms of cross-cultural adjustment the most important sources for support are the organisation and the family support, as discussed below. The stress theory clearly refers to psychological adjustment, whereas the culture-learning theory focuses on the socio-cultural side of adjustment (Ward & Kennedy, 1996).

The culture-learning theory emphasises the possession of culturally appropriate skills and behaviours through contact with host nationals, cross-cultural experience and training (Furnham & Bochner, 1982). Both theories therefore predict different antecedences on cross-cultural adjustment. However, this research study proposed that factors from both theories will have a significant impact on the expatriate’s ability to cross-culturally adjust. Therefore, anticipated factors will be explained by using one of theories.

### 2.2.2 Different approaches to adjustment

Berry (2001) has outlined four different approaches to adjustment. Although, these approaches were initially developed for immigrants, they may be used for expatriates and their cross-cultural adjustment (Morley et al., 2004, p. 205). These four approaches are integration, separation, marginalization and assimilation (Table 2.1).

Integration describes when expatriates maintain values and customs of their native culture and integrate the values and customs of the host society. This enables them to become full participants in society (Berry, 2001). Separation occurs when individuals have no desire to integrate any parts of the values and norms of the host culture into their own culture. Those individuals choose to remain segregated and focus on maintaining their cultural heritage. Marginalisation takes place when the expatriate has no desire to identify with his or her own culture or to mix with the host culture.
Table 2.1:
Berry’s different approaches to adjustment

<table>
<thead>
<tr>
<th>Approaches to adjustment</th>
<th>Is it considered to be of value to maintain cultural identity and characteristics?</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Is it considered to be of value to maintain relationships with other groups?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

Source: Berry, Kim, Power, Young & Bujaki, 1989, p. 190

Finally, assimilation arises when expatriates replace their native culture and customs with the culture and customs of host society. The expatriate has no desire to maintain his or her own culture. Research has shown that integration usually is the most successful approach, whereas marginalisation and separation do not lead to successful adjustment (Berry, 1997, p. 24; Furnham & Bochner, 1986, p. 27; Morley et al., 2004, p. 206).

2.3 Individual factors

Traditionally, companies have focused on managerial and technical skills when appointing expatriates (Adler & Zhu, 2005; p. 4; Andreason, 2002, p. 21-22; Brynningsen, 2009, p. 4; Wright, Geroy & Baker, 1996, p.35). However, research has identified certain traits and characteristics as predictors of expatriates’ success in foreign assignments (Caligiuri, 2000 a & b; Morley et al., 2004, p. 206; Ramalu, Rose & Uli, 2010).

Early research in this area focused typically on single, selected desired personality characteristics and traits, such as cultural empathy, adaptability, diplomacy, a positive attitude, emotional stability and maturity, drive, leadership qualities, self-confidence and willingness to experiment with different customs
(Brewster, 1993; Hiltrop & Jansen, 1990; Mendenhall & Oddou, 1985). However, Caligiuri (2000b) used the concept of the Big Five personality traits as a holistic concept to merge those traits.

### 2.3.1 The “Big Five” Personality traits

The “Big Five” represent a taxonomy of traits that personality psychologists propose to capture the essence of individual differences in personality. Although there are many personality characteristics, the “Big Five” factors have been found to provide a useful typology or taxonomy for classifying them (Digman, 1990; Goldberg, 1992; McCrae & Costa, 1989, 1992; McCrae & John, 1992). These factors have been confirmed and validated across time, context and cultures; hence they are universally applicable for human beings around the world (Caligiuri, 2000b, p. 71; Rust, 1999).

The “Big Five” personality factors are extroversion, agreeableness, conscientiousness, emotional stability and openness.

- **Extroversion versus introversion.** People who score high on extroversion tend to be gregarious, assertive and interested in seeking out excitement. It includes traits such as sociability, activity, assertiveness, and positive emotionality (Price & Novicevic, 2001, p. 70).

- **Agreeableness** refers to people who are being identified as a team player through the formation of reciprocal social alliances and the building of social capital in the organisation. Typical traits would be tender-mindedness, trust, and modesty (Goldberg, 1992).

- **Conscientiousness** is a tendency to show self-discipline, act dutifully, and aim for achievement against measures or outside expectations. It deals with the way people control, regulate, and direct their impulses (Price & Novicevic, 2001, p. 70).

- **Neuroticism** contrasts emotional stability. The latter is an enduring tendency to experience negative emotional states. On the opposite end of the spectrum, individuals who score low in neuroticism are more emotionally stable and less reactive to stress. They tend to be calm, even-tempered, and less likely to feel tense or rattled (Zuckerman, 2005, p. 125).
- Openness to experience refers to the willingness to accept new and unconventional ways of thinking and behaving, manifest in such traits as creativity, imaginativeness, curiosity, and aesthetic appreciation (McCrae & Sutin, 2009, p. 257).

In terms of desirable “Big Five” personality traits that an expatriate needs, these adaptive mechanisms include humans’ ability to learn hierarchies in a foreign society (extroversion), "their willingness to cooperate (agreeableness), their capacity for reliable work and enduring commitment (conscientiousness), their ability to handle stress (emotional stability), and their propensity for innovation or astuteness in solving problems (openness)" (Buss, 1991, p. 477).

Generally, research has shown that all of the “Big Five” personality traits have a positive correlation to expatriates success (Huang, Chi & Lawler, 2005; Ramalu et al., 2010; Stroh & Caligiuri, 1998, p. 5).

It has been shown that general adjustment among expatriates (and immigrants) is related with greater extraversion and agreeableness. A high score on agreeableness is associated with greater interaction adjustment and greater conscientiousness and openness to experience is linked to greater work adjustment (Swagler & Jome, 2005; Ward, Leong & Low, 2004). Additionally, it was found that superior communication skills will avoid a culture shock and facilitate coping strategies when living in a foreign country. However, communication skills form part of extraversion (García, Vázquez & Garduño, 2008).

Ramalu and colleagues (2010) showed in their recent study that expatriates who scored high on extraversion could adjust better in the general environment. A high score on agreeableness leads to better general and interaction adjustment and people with greater conscientiousness and openness to experience adjust better to work environment. Caligiuri (2000b) came to similar results in her research. She researched the influence of the “Big Five” characteristics towards the expatriates desire to terminate the assignment. Her results suggested that extroversion, agreeableness, and emotional stability are negatively related to the desire to terminate the assignment. Additionally, conscientiousness is positively
related to the supervisor rated performance on the expatriate assignment. Thus, expatriates who possess the “Big Five” personality traits should be able to adjust easier and succeed in their foreign assignment.

2.3.2 Language

A lack of language skills has been identified to be the main problem when it comes to cross-cultural adjustment (Andreason, 2008, p. 387). This can be explained with the contact hypothesis or association hypothesis. This theory simply states that the more contact a person has with another person from a different cultural group, the more positive his or her position will be toward people of the cultural background (Caligiuri, 2000a, p. 66). The contact hypothesis is in similar vein with the social learning theories. Hence, a lack of language skills will diminish the chances to having contact with people from the host country. In line with that research, Kraimer and his colleagues (2001, p. 90) have shown that there is a positive correlation between language fluency and interaction adjustment. Being able to communicate in the home-country language increases the ability to develop a social network in the host-country which will in turn lead to better adjustment (Tanake, Takai, Kohyama, Fujihara & Minami, 2002, p. 15), since it fosters social networks and thus social support.

Additionally, spouses who were able to speak the host-country language were more likely to enjoy the foreign assignment. This is especially relevant, since the failure for spouses to adjust is one of the main reasons for assignments to fail (Black & Stephens, 1989; Kraimer et al., 2001, p. 92; Milliman, von Glinow & Nathan, 1991, p. 329; Selmer, 1999, p. 78). Hence, expatriates who are able to communicate in the host-country language will be able to adjust more easily.

2.3.3 Previous overseas experience

Previous overseas experience has been identified as a major factor in terms of the ability to cross-culturally adjust as well as an aspect linked to the expatriate’s willingness to adopt overseas assignments (Black et al., 1991; Church, 1982). Additionally, it has been shown that people with overseas experience are able to draw from their previous experience into a new situation and thereby are able to
reduce stress. This in turn will make adjustment easier (Cai & Rodriguez, 1996, p. 30-31) this is in similar vein to the contact hypothesis. Therefore, expatriates with previous overseas experience are more likely to fulfil their assignment successfully.

2.3.4 Gender

Research has found that only 23 per cent of the expatriated population are female, whereas almost 50 per cent of the working force in western countries are women (Tharenou, 2008, p. 183). Since there are a number of different explanations for that phenomenon only the most notable explanations are discussed below.

One explanation is offered by Hartl (2004, p. 40) where he states that the lack of female expatriates is a reflection of the glass ceiling. Glass ceiling refers to barriers that prevent women and minorities from advancing to management positions in corporations and organisations (The economist, 2005). Due to this there are limited networking opportunities for women in management, compared with men who have more co-workers in their network which gives males a professional advantage (Linehan & Scullion, 2001). Additionally, a closed and informal selection system that may be male-biased is often used as an explanation (Moore, 2002; Tharenou, 2008). Adler (1993) showed in her research that low selection of female expatriates is mainly based on two assumptions. Firstly, women do not seek international assignments based on family issues and secondly, host-country nationals refuse to take women seriously in business (especially in Asian and Arabic countries). Those common beliefs have been conformed by a number of researchers (Paik & Vance, 2001; Tharenou, 2008).

However, research has shown that those beliefs are not valid. For a detailed discussion on this issue see Adler (1984), Caligiuri and Tung (1999) or Westwood and Leung (1994). Thus, gender should not be considered as a success factor of an international assignment.
2.4 Organisational factors

Research has shown that certain variables have a significant impact on an expatriate’s ability to cross-culturally adjust (Morley et al., 2004, p. 208). The most major ones are pre-departural cross-cultural training, differences between the parent and the foreign company and the support provided by the organisation. However, there might be possible additional organisational antecedences, which are discussed at the end of this part.

2.4.1 Cross-cultural training

Cross-cultural training can be defined “as the educative processes used to improve intercultural learning via the development of the cognitive, affective, and behavioral competencies needed for successful interactions in diverse cultures” (Littrell, Salas, Hess, Paley & Riedel, 2006, p. 356). Cross-cultural training has been identified as one essential factor for cross-cultural adjustment and it is evident that cross-cultural training is effective in facilitating success on expatriate assignments (Littrell et al., 2006, p. 355). However, the empirical support for the effectiveness of cross-cultural training varies widely. Research has found correlations between expatriate cross-cultural training and expatriate adjustment ranging between $r = -.42$ and $r = .57$. Similarly, correlations between training and performance range depending on the study from $r = -.08$ to $r = .79$ (Selmer, 2006, p. 40).

In addition, there is no consensus about the type of training which must be offered. As well as is it not well understood whether the components of cross-cultural training should differ according to factors such as: “the cultural toughness of the assignment, the assignment’s duration, the degree of interaction with host nationals, and differences in tasks to be performed on the job” (Harvey, 1996, p. 23).

Nevertheless, training has been identified to support cross-cultural adjustment in various ways. Firstly, it helps to reduce cultural based stress, since it reduces uncertainty associated with the transition and facilitates the formation of accurate expectations (Moreley et al., 2004, p. 208). Secondly, it helps expatriates to figure
out appropriate behaviour in the new culture and expected ways how to perform the job in the host country. Thirdly, cross-cultural training should enable expatriates to deal with unforeseen situations in the new culture and thereby, reduce conflict. Lastly, training will help expatriates to have realistic expectations in respect to living and working in the host country (Caligiuri et al., 2001, p. 358).

Although, there is a consensus about the aims of cross-cultural training (reduction of culture shock, managing change, managing cultural differences and managing professional responsibilities) there are three major problems in respect of cross-cultural training. Firstly, there is a lack of unitary theoretical framework for cross-cultural training (Littrell et al., 2006, p. 362). Secondly, most international companies are not able to provide cross-cultural training in a formal and organised manner (Morley et al., 2004, p. 208; Littrell et al., 2006, p. 358; Tungli & Peiperl, 2009, p. 156). Thirdly, even studies examining training effects on business expatriates typically fail to examine the impact of the specific circumstances of the foreign location (Brynningsen, 2009, p. 6). Nevertheless, most studies do advocate the positive affect of cross-cultural training on cross-cultural adjustment (Harris & Brewster, 2004; Harvey & Moeller, 2009, p. 280; Morley et al., 2004, p.208; Selmer, 2005).

It was found that if cross-cultural training is competently managed and well executed it can be a key intervention in promoting assignment success, averting failure, and increasing the return on investment for all parties involved: the employee, the family members and the company (Bennett et al., 2000). Additionally, in her research Caligiuri and her colleagues (2001) were able to show that the more tailored and relevant the pre-departural training the greater the possibility for the expatriates’ expectations to be met. The study shows that having accurate expectations, in turn, positively affects cross-cultural adjustment, and that accurate expectations can be formed by tailored and relevant pre-departural cross-cultural training.

Therefore, certain variables should be considered by the organisation when developing a cross-cultural training. Typical factors would be the motivation of the candidate (and family), the skills and the knowledge of the candidate in terms of technical, management, language (including the language skills of the family).
Training should also include general country information, such as demographic, religious, political, social, economical, and cultural specific information (Wright et al., 1996, p. 37).

A model proposed by Mendenhall, Dunbar and Oddou (1987) states that if the expected level of interaction with host nationals is low and the similarity with the manager’s native culture is high, the pre-departure training can take less than a week. Firms can rely more on information-giving approaches such as area or cultural briefings by way of lectures, movies or books. However, if the cultural distance is bigger and there is a high chance of contact with the people from the host country the training should be at least one to four weeks. In addition to information-giving approaches, firms should utilise more experiential training methods such as cultural assimilators and role plays, which expose trainees to the kinds of situations they are likely to encounter, critical to successful interactions. Finally, if the host country has a fairly different culture and there is a high degree of interaction expected, the training should at least last two months. Figure 2.1 below indicates how situational factors influence cross-cultural training.

Research has shown that there are alternative supplements to training, which are cheap and easy to access (Harris & Brewster, 2004, p. 226-227). Those supplements would be:

- Informal briefings (including the family of the expatriate)
- Look and see visit in order to give the expatriate and the family a clear idea what to expect
- Overlap this refers to assigning the new expatriate to the host country while the former one is still there

Finally, even when companies offer cross-cultural training, they often fail to involve the spouse in either the selection process and/or the cross-cultural training (Tungli & Peiperl, 2009). Despite this, research has shown that the most often quoted reason for premature return is the spouse’s inability to adjust to the foreign environment (Kraimer, et al., 2001).
However, companies should not only focus on pre-departure training, but on training during the assignment as well. This is especially important in terms of language training and when being sent to a fairly different culture (Bennett et al., 2000). Yet, training other than taking place prior to the departure training can be categorised as organisational support. This approach is suggested by many authors (Morley et al., 2004; Kraimer et al., 2001).

Consequently, if a company offers cross-cultural training, which is tailored for a specific assignment and includes the family, the expatriate are more likely to succeed in his or her assignment.

2.4.2 Differences within the organisations

Research has shown that the greater the difference between home organisation and host organisation, the more difficult the work adjustment for expatriates will be (Morley et al., 2004, p. 209). In turn the more similar both organisations are the more likely it is that expatriates know what to expect; this will help to reduce
the level of uncertainty in terms of work-related adjustment (Morely et al., 2004, p. 209). In their study Bonsiep, Eckert, Rässler and Mayer (2003) showed that a negative affect on adjustment is possible if the corporate culture of the parent company and the subsidiary differ. The most obvious differences organisational culture (including management systems) and leadership style are discussed below.

2.4.2.1 Organisational culture

Organisational culture can be defined as (Brown, 1995, p. 8) “the pattern of beliefs, values and learning ways of coping with experience that have developed during the course of an organisation’s history, and which tend to be manifested in its material arrangement and in the behaviours of its members”

However, a problem of previous research is that culture has been usually regarded in a too general sense with not enough attention given to the differences between varying different kinds of cultures. Exceptions however are the work conducted by Harrison (1972), Kreitner and Kinicki (2001) and Cameron and Quinn (1999). The latter distinguish four types of cultures: the collaborate (clan), the control (hierarchy), the create (adhocracy) and the compete (market) culture. These four types are differentiated based on their flexibility and stability as well as internal focus and external focus. The clan culture places a great emphasis on flexibility and internal focus and is often compared to a family based on its propensity to characteristics such as teamwork, participation and corporate commitment to employees (Zammuto & Krakower, 1991). The adhocracy culture stresses flexibility and external focus, hence those companies are able to adapt to change quickly and meet new challenges, with a strong emphasis on growth resource acquisition. The market culture is result-oriented and places emphasis on increasing market share; those companies are highly competitive. Lastly the hierarchy culture “reflects the values and norms associated with bureaucracy” (Zammuto & Krakower, 1991, p. 87). Thus, this culture has a formalised structure with internal control maintained by centralised decisions with a focus on stability, predictability and efficiency.
It is essential to understand that there are different types of culture; but no type is superior to the other. However, no research has been done about how influential the organisational culture is on expatriates’ ability to cross-culturally adjust. This is quite surprising for a number of reasons.

Firstly, as far back as in 1991 Yeung, Brockbank and Ulrich investigated the relationship between organisational culture and all human resource practices. They found that all HR practices differ significantly across different types of culture. Therefore it is likely that the organisational culture will influence international HR practices as well. However, Adler and Zhu (2005) aimed to fill this specific gap. They explored the relationship between organisational culture and expatriate selection strategy. Yet, this study among sixtyseven HR professionals did not show any significant differences based on organisational culture. Nevertheless, there might be differences in terms of other HR practices and hence expatriate’s cross-cultural adjustment.

Secondly, the culture of one company might differ essentially in the host country as compared to the home country based on whether the company follows an ethnocentric, polycentric, geocentric or regiocentric approach. A company which follows an ethnocentric approach uses the systems developed in the home country, and the values, attitudes, practices and priorities of headquarters determine the human resources policies and practices. Hence, organisational culture of the home country will probably not differ significantly from the host country (Gmür & Thommen, 2006, p. 20).

When following a polycentric approach companies will consider the needs of local subsidiary when formulating HR polices and practices, as well as the management systems. A regiocentric approach focuses on the needs of a specific region when implementing systems. Finally, the global or geocentric approach follows a best fit concept. The company’s priority is the optimal use of all resources and local or regional implications are not considered important for the success of the corporate strategy (Heenan & Perlmutter, 1979).

Based on those different approaches it would stand to reason that if there are a difference between the home organisational culture and the host country culture
adjustment would be more difficult, since it could be a double burden. Therefore, cultural adjustment should be more difficult for expatriates if the company follows a regiocentric or polycentric approach.

2.4.2.2 Leadership styles

Research has shown that adjustment difficulties can be caused by different leadership styles. Expatriates may feel forced to change their management style, which in turn can lead to problems in adjusting to the workplace and jeopardising the success of the assignment (Suutari & Brewster, 2004, p. 192).

Leadership styles are influenced by three factors. Firstly, national culture influences leadership. Deeply held values regarding the rights and duties of citizens form the core of national culture and constitute a worldview. If leaders violate core values they lose their authority over subordinates and may risk being removed from the leadership position. Secondly, political culture influences leadership. Countries with democratic political values, for example, prefer participative leadership. Thirdly, organisational culture influences leadership. If a leadership style is in contradiction to the cultural values of the company, this leadership style will not be successful within the organisation (Francesco & Gold, 2005, p. 214-220).

Based on the above assumptions, the Project GLOBE researched cross-cultural leadership differences and similarities (House et al., 2004). As a part of their study of culture and leadership, GLOBE researchers developed their own classification of cultural dimensions. GLOBE researchers identified nine cultural dimensions: Uncertainty avoidance, power distance, institutional collectivism, ingroup collectivism, gender egalitarianism, assertiveness, future orientation, performance orientation, and humane orientation (Francesco & Gold, 2005). The data from the 62 countries studied in the GLOBE study were divided into regional clusters. These clusters provided a convenient way to analyse the similarities and differences between cultural groups and to make meaningful generalisations about culture and leadership. In order to create those clusters, the researchers used common language, geography, religion, and historical accounts. Based on these factors, they grouped countries into ten distinct clusters: Anglo, Latin
Europe, Nordic Europe, Germanic Europe, Eastern Europe, Latin America, Middle East, Sub-Saharan Africa, Southern Asia and Confucian Asia (House et al., 2004). Therefore, work related adjustment should be easier if an expatriate works in the same country cluster.

2.4.3 Organisational support

One of the biggest stress factors is the “loss of social support provided by the organisation, family and friends” (Harvey, 1995, p. 226). Social support can be defined as a “buffer against stress and a positive association of emotional well-being” (Copeland & Norell, 2002, p. 255). This support can be provided by organisations, supervisors, co-workers and family members (Harvey, 1998). Social support therefore plays an essential role in the process of cross-cultural adjustment of expatriates. This is because social support is believed to be able to reduce the stress associated with working in a new cultural environment (Kraimer et al., 2001).

It has been shown that perceived social support contributes to self-esteem and general adjustment of individuals at work, schools and other social organisations (Procindano & Smith, 1997). An individual’s “perception of social support can have an important impact on […] social adjustment and [the] ability to cope with stress (Mankowski & Wyer, 1997, p. 141).

Therefore, social support should help expatriates ability to cross-culturally adjust. Research has shown that organisational support has an enormous impact on the expatriates’ ability to adapt to the new environment since expatriates often lose their social home network (Grant-Vallone & Ensher, 2001, p. 267). In addition, the organisation has a much higher impact on the expatriates’ life then it would have had at home. Organisational support refers to direct organisational support such as logistic support. As well as indirect organisational support such as perceived organisational support (POS) and the fulfilment of the psychological contract. Some authors state that organisational, supervisor and co-worker support is positively related to expatriates work adjustment (Kraimer & Wayne, 2004). Other scholars even state that organisational support is the primary factor influencing expatriates’ ability to cross-culturally adjust (Shaffer et al., 1999).
2.4.3.1 Direct organisational support

Direct support can have different forms such as continuous training provided by the organisation during the assignment (Andreason, 2002, p. 24), logistical support in terms of information on housing, education and travel (Morley et al., 2004, p. 208) and family mentoring programs (Andreason, 2002, p.24). Additionally, an important factor in direct support would be assistance in the family/spouse adjustment. This includes help in finding schools for the children, helping dual career couples in assisting finding a job for the spouse (Harvey, 1998, p. 311). Moreover, a general concern from the organisation towards the expatriate’s health, well-being and work-life balance can be seen as direct organisational support (Grant-Vallone & Ensher, 2001, p. 267). Lastly, the compensation and reward policy by the organisation can be defined as direct organisational support. The impact rewards and compensation have on cross-cultural adjustment is discussed below (see 2.3.4.2).

2.4.3.2 Perceived organisational support

Organisational support theory is based on the assumption that employees “form general beliefs concerning how much the organisation values their contributions and cares about their well-being” (Eisenberger, Armeli, Rexwinkel, Lynch & Rhoades, 2001, p. 42). Research has shown that POS is positively related to organisational commitment, organisational citizen behaviour, attendances rate, job performance and prosocial behaviours (Eisenberger et al., 2001). Rhoades and Eisenberger (2002) found in a meta-analysis three main work-experience antecedents of POS: Organisational rewards and working conditions, support received from the supervisors and procedural justice. However, research has shown that perception of the support is more important than the de facto support received (Tung, 1998).

Since POS is a well researched field researchers have started to identify the influence of POS on expatriates’ ability to cross-culturally adjust. When dealing with POS in terms of expatriates, it is essential to consider the dual employment relationship of expatriates (Harvey, 1996, p.22). Due to this, expatriates can receive support from the parent organisation as well as from the foreign facility.
(Kraimer et al., 2001). Thus, Kraimer and his colleagues (2001) were able to show in their research among 583 American expatriates that expatriates are well aware from which organisation (parent or foreign) they receive support and that POS from both facilities helps the cross-cultural adjustment of expatriates. Firstly, POS from the parent company is positively related to the expatriate’s work and general adjustment. Secondly, POS from the foreign facility is positively related to the expatriate’s work, general and interaction adjustment.

Based on what was stated earlier, companies should ensure more than usual support. Besides to pre-departural cross-cultural training and financial support the parent company should offer other types of support as on-going career counselling, psychological counselling for expatriates experiencing stress and anxiety, and in-country contractual services to help in the transition period. Additionally, the foreign company should provide support, such as a mentoring program (Kraimer et al., 2004).

2.4.3.3 Psychological contract

Since a fulfilment of the psychological contract in expatriates’ perception can be interpreted as support from the organisation to expatriates (Chen & Chiu, 2008, p. 801), this is discussed below.

The psychological contract “encompasses the actions employees believe are expected of them and what response they expect in return from the employer” (Roussear & Greller, 1994, p. 385). It is argued that psychological contracts are key determinants of employees’ attitudes and behaviours in the workplace (Schein, 1980). The literature differs between two elements in the psychological contracts: The transaction and the relational elements. The transactional element is closely associated the most with the formal, written contract, specifying a rate of pay and possible bonuses for services provided. The relational element however relates to the emotional and social exchange between both parties. Relational elements refer to trust, loyalty and the interpersonal exchange between employer and employee (Lewis, 1997, p. 281). A breach of this contract will decrease job satisfaction, increase turnover and reduce loyalty as well as commitment (Lambert, Edwards & Cable, 2003, p. 895). A fulfilment of the
psychological contract will in turn lead to increased job satisfaction, lower turnover and organisational commitment and organisational citizenship behaviour (Robbins & Judge, 2009, p. 233). Based on the above discussion it is logical to assume that psychological contract fulfilment can play a significant role in enhancing overseas adjustment, due to the fact that it is a form of organisational support.

For expatriates, the psychological contract will be significantly more important than for a domestic worker since overseas, the employer has a far more significant influence on the expatriate’s life, both on and off the job (Guzzo, Noonan & Elron, 1994). The fulfilment of a psychological contract can be seen as the relief of psychological stressor (Chen & Chiu, 2008, p. 807). In their research among 219 Taiwanese business expatriates Chen and Chiu (2008) were able to show that the fulfilment of expatriates’ psychological contracts has a positive and significant influence on their adjustment to a foreign environment. Unfortunately, Chen and Chiu (2008) did not differentiate between parent and foreign facility as Kraimer and his colleagues did. However, it can be assumed, based on their study that Chen and Chiu (2008) refer to the parent company.

2.4.4 Possible additional organisational factors

2.4.4.1 Expatriates’ selection process

The company’s expatriate’s selection process is not considered as a variable that influences the expatriate’s ability to cross-culturally adjust. Nevertheless, it is briefly discussed in this study since the process influences which individuals are sent abroad. Additionally, it links the individual factors with the organisational factors; which companies should consider when selecting expatriates.

In the expatriates’ selection process companies tend to use selection criteria which are based on the same success factors as in the domestic setting (usually technical and leading competencies). Organisations have the assumption that those skills are universal and applicable everywhere (Harris & Brewster, 2004, p. 230). Nevertheless, additional criteria related to specific circumstances of each international position must be considered (Deresky, 2000, pp. 24-28). Foreign
assignments do not fail because of the lack of technical or leading skills, but due to the managers’ inability to adjust (Andreason, 2002, p. 22; Brynningsen, 2009, p. 4). Caligiuri (1997, p. 131) even found that technical skills or a lack of technical skills do not correlate to the desire to terminate the assignment. Hence, companies should focus on skills more closely related to the ability to cross-culturally adjust. Typical personality factors would be a big five personality (Caligiuri, 2000b) as well as flexibility, desire to adjust, tolerance of ambiguity, leadership qualities, interpersonal skills and self-confidence, cultural empathy and emotional stability (Morley et al., 2004, p. 206).

A further possible problem is that companies, in terms of the selection process, find that expatriates tend to regard assignments abroad as unattractive due to the often-quoted high failure rate. This can lead to a situation where companies struggle to find people rather than being able to choose the best people (Selmer, 2001). However, some studies show that a foreign assignment still benefits the individual’s career path. Hence companies still have a big candidate pool to choose expatriates from, if the benefits of a foreign assignment are pointed out (Black et al., 1991, Caligiuri, 2000a; Tungli & Peiperl, 2009).

Several factors have been identified by researchers that should be considered in the selection of successful expatriates. These factors include: “strategic factors, conflict resolution skills, leadership skills, communication skills, social skills, flexibility and stability, technical ability, cross-cultural suitability, family requirements, company requirements, language” (Brynningsen, 2009, p. 5). Other factors to be considered include “cultural empathy, adaptability, diplomacy, a positive attitude, emotional stability and maturity” (Andreason, 2002, p. 22) in line with the individual characteristics mentioned above (see 2.1).

Additionally, as already discussed in this study the family situation and their ability to adjust play a crucial role in the expatriate’s cross-cultural adjustment process. Therefore, the company should consider the candidate’s family and their needs in the selection process (Brynningsen, 2009, p. 6). Consequently, if companies consider these factors in addition to technical skills the chosen expatriate is more likely to succeed in the foreign assignment.
2.4.4.2 Reward and compensation

When accurately designed, compensation systems promote desirable employee behaviours, which are instrumental to the successful implementation of business strategies. The decision on how to compensate individuals must be based on the HR strategy and take the social, competitive and regulatory environment into account. This will result in a compensation system which will influence employees’ attitudes and behaviours which finally can lead to a competitive advantage (Milkovich & Newman, 2007, p. 32).

International firms are well aware of this fact and use compensation and benefit packages to support their expatriates. In terms of expatriates, those packages are usually designed to (Anderson, 2002, p. 23):

- Attract and retain staff
- Provide an incentive for managers to leave the home country on a foreign assignment
- Facilitate the transfer to the foreign location and back
- Maintain an acceptable standard of living in the foreign location and hold the purchasing power parity
- Provide opportunities for financial advancement through income and/or savings.

However, there has been almost no research on the effect of compensation on cross-cultural adjustment of the expatriate or on the influence compensation has on the success of the assignment. The little research that has been conducted shows contradictorily results. On the one hand Reynolds (2005, p. 61) states that better salary packages will not have an influence on the decision to take on the foreign assignment. On the other hand a study among Taiwanese managers showed that the compensation packages was the most important factor in deciding whether or not to relocate internationally (Toh & Denisi, 2005, p. 139).

However, Toh and Denisis (2005) raised the concern that an overpay of the expatriates in comparison to the local staff can lead to internal inequality and this
in turn can lead to a decrease in job satisfaction and lower productivity among the local workforce.

Additionally, compensation is not seen as one of the typical adjustment factors as discussed above. Nevertheless, it might have an influence on the willingness to adjust and the desire to succeed in the assignment. This should be especially true if the success of the foreign assignment is linked to a variable bonus pay.

2.5 Job factors

Research suggests that certain job variables have an influence on expatriates’ ability to cross-culturally adjust (Morely et al., 2004, p. 207). Job variables obviously have the greatest impact on work adjustment in terms of the three adjustment types as defined by Black and Stephens (1989). When sent overseas the individual often has to deal with new operations, new means of completing tasks and an increase in responsibility (Selmer & Fenner, 2009, p. 80). In a meta-analysis of the importance of job factors in expatriate adjustment it was found that the most important factors for work adjustment were role ambiguity or clarity (r = .41), role discretion (r = .43) and role conflict (r = .46) (Hechanova-Alampay, Beehr & Christiansen, 2001, p. 148). However, role novelty and role overload have a significant influence on work related adjustment as well (Morely et al., 2004, p. 207).

2.5.1 Role novelty

The difference between the expatriate’s previous position in comparison to the new position is called role novelty (Black, 1988). In other words, role novelty is "the degree to which the role permits the exercise of prior knowledge, practiced skills, and established habits" (Nicholson, 1984, p. 178). A higher degree of role novelty can increase uncertainty which can hinder a high degree of work adjustment. This is in similar vein to the influence of culture novelty on cross-cultural adjustment, which is discussed below (see 2.6.2).
2.5.2 Role clarity

Role clarity entails an understanding of the position requirements providing the expatriate with a clearly defined set of expected behaviours (Selmer & Fenner, 2009, p. 83). Research has shown that the greater the role ambiguity, the less the expatriate is able to predict the outcome of various behaviours. This may cause feelings of ineffectiveness and frustration (Black, 1988, p. 281). Research has shown that the greater the role ambiguity the smaller the degree of adjustment. Therefore, it has been argued that firms should place more emphasis on designing foreign assignment positions so they provide clearly defined jobs for their expatriates (Shaffer et al., 1999).

2.5.3 Role discretion

Role discretion refers to expatriates’ authority to determine the parameters of the new position. This refers to the amount of leeway individuals have in performing their job responsibilities, or to the authority and the decision making latitude in their jobs (Andreason, 2003, p. 50). Role discretion is seen as the most important factor in determining the expatriate’s work adjustment (Brynningsen, 2009, p. 10). Additionally, it was found that decision autonomy was significantly and positively related to all three aspects of expatriates’ cross-cultural adjustment (Takeuchi, Shay & Li, 2008). This can be explained by the spill over effect which states that the satisfaction of one adjustment aspect will have a positive influence on another aspect (Takeuchi, Yun, & Tesluk, 2002). The spill over theory examines the relationship between an individual's work and non-work domains and emphasizes the reciprocity of this relationship. In other words, affective responses from one domain may be carried over to the other domain (Aldous, 1969; Barnett & Marshall, 1992).

Therefore, when companies appoint an expatriate, they should ensure that they have decision autonomy.
2.5.4 Role conflict

Role conflict occurs when the individual receives incompatible and/or conflicting information about what is expected of individuals in a new work setting (Selmer & Fenner, 2009, p. 76). A typical situation in which role conflict could arise is through different leadership styles, which can lead to feelings of uncertainty and confusion (Morley et al., 2004, p. 208). Additionally, in a new cultural setting, contradicting signals may raise uncertainty due to the fact that an expatriate is required to understand conflicting signals, then to retain the relevant ones and finally to execute appropriate behaviours (Andreason, 2003, p. 51). Therefore, role conflict has been found to be especially important for expatriates as they have to reconcile that different demands of home and host organisation (Christensen & Harzing, 2004).

2.5.5 Role overload

Role overload happens when excessive demands are placed upon the expatriate in the new position (Morley et al., 2004, p. 208). It can be differentiated between qualitative and quantitative role overload. A qualitative role overload refers to a lack of necessary skills and competencies to complete the task. Quantitative role overload refers to the individuals difficulties to complete an assigned task within an allotted period of time (Pines & Maslach, 1978). This could reduce the expatriate’s ability to perform the job satisfactorily hence making adjustment more difficult.

2.6 Non-work factors

Research has shown that certain factors not related to work have a significant influence on expatriate’s ability to cross-cultural adjust (Morley et al., 2004, p. 209). The most significant ones are spousal and/or family adjustment, cultural novelty and social networks (Haslberger, 2005).

2.6.1 Spousal adjustment

Several researchers were able to show that the spouse’s ability to cross-culturally adjust had significant impact on the success of the assignment. It was found that
spouse adjustment is positively related to the general adjustment of the expatriates by Black and Gregersen (1991) ($r = .80$) as well as by Shaffer et al. (1999) ($r = .34$). Another study found that family adjustment is significantly positively related to interaction adjustment (Bonsiep et al., 2003). Even further the meta-analysis done by Bhaskar-Shrinivas, Harrison, Shaffer and Luk (2005) showed that the spouse adjustment to expatriate adjustment connection ($r = .60$) was the strongest of all tested cross-cultural adjustment antecedences. They found that the mean correlations of spousal adjustment were on an average of 0.49 with general adjustment, 0.38 with interaction adjustment and 0.22 with work adjustment. Hence, spousal adjustment has been identified as a critical source for cross-cultural adjustment. This can be again explained through the spill over effect (Kraimer et al., 2001).

This is especially relevant considering that about two-thirds of international expatriates are accompanied by a spouse, children or both (Cartus, 2007). Hence, one of the most cited reasons for expatriate failure is the inability of the spouse and children to cross-culturally adjust (Bennett et al., 2000; Black & Stephens, 1989; Kupka, Everett & Cathro, 2008; Suutari & Brewster, 1998).

Traditionally, spousal adjustment was treated similarly to expatriate’s adjustment in terms of general and interaction adjustment and omitted the work adjustment (Black & Stephens, 1989). However, it is questionable if this omission can be justified nowadays considering the high number of dual career couples (Harvey, 1995 & 1996).

This inability of the spouse (and family) to cross-culturally adjust seems to be based on a number of reasons. Usually the spouse is the one being more exposed to the new culture. Whereas the expatriates usually has the most contact with the company and therefore is buffered from the local environment, the spouse must often live without the familiar network of family and friends, without adequate language skills or cultural training and without adequate support programs to assist in developing an appropriate lifestyle while overseas (Black & Stephens, 1989, p. 541). Especially, in recent years this problem has been aggravated due to the dual careers of couples. Indeed research implies that increasingly a contributing factor in the decision to turn down an overseas
assignment in the first place may be the impact of that assignment on the spouse’s career (Harvey, 1996, p. 22). Additionally, there has been an increase in female expatriates with a male spouse who almost always had a job before accompanying their husbands (Cartus, 2007). Hence, a distinction can be drawn between three different types of spouse expatriates who all require different support from companies.

Firstly, the female spouses who do not expect to work in the foreign county. Secondly, the female spouses who expect to work in the foreign location and thirdly, male spouses, who predominately expect to work in the foreign location (Punnett, 1997, p. 246). Whereas all types have to deal with the culture shock, for the second and third types the company must also well ensure that the spouse can work during the foreign assignment. Although some spouses expect to work, research has shown that even though 80 per cent of the expatriates are married and 61 per cent of the spouses have a professional activity before leaving, only 18 per cent of them continue to work aboard (Payne, 2002, p. 2). This can lead to frustration for the spouse and in turn can hinder the expatriates’ ability to cross-culturally adjust (Punnett, 1997).

Additionally, children may deal with the same problems as the spouse since one of the most problematic areas in global transition for children is with respect to their education and re-establishing social networks (Brett, 1982; Fukuda & Chu, 1994).

Therefore, it is essential that organisations consider the family situation of the expatriates in a number of ways. Firstly, the family situation must be considered in the selection process to predict their capability and willingness to live and work abroad (Wright et al., 1996, p. 35). As Physical and psychological traits are not usually significantly affected by training it is important to determinate the willingness of the family to relocate (Tung, 1981, p. 72).

Secondly, cross-cultural training should also be provided to the family of the expatriate, especially language training (Caligiuri & Tung, 1999, p. 765). The inability to communicate with the local community can lead to frustration and isolation (Fukuda & Chu, 1994, p. 45) and will hinder building a social network
(Baker & Ivancevich, 1971). This social network however is more important for the spouse, since the expatriate can usually use the colleagues as social networks and the spouse is more exposed to the new culture (Black & Stephens, 1989). Additionally, the spouse has a higher probability to encounter people who do not speak English, when being sent to a non English speaking country (Adler, 1997, p. 274). It has been shown that the ability to interact with the local community has a positive influence on the spousal adjustment (Shaffer & Harrison, 2001).

Thirdly, companies should provide corporate relocation support to the spouse throughout the overseas assignment in addition to support provided purely to the expatriate (Andreason, 2002, p. 22).

**2.6.2 Cultural novelty**

Cultural distance is often seen “as the extent to which cultural aspects of the home country differ from the host country” (Earley & Ang, 2003, p. 42). National culture can be defined as “the collective programming of the mind which distinguishes the members of one group or people from another” (Hofstede, 2001, p. 5). It includes “a set of attitudes, behaviours and symbols” which is “shared by a large group of people and usually communicated from one generation to the next” (Shiraev & Levy, 2004, p. 4).

Between 1967 and 1973, Hofstede undertook surveys in 66 countries with more than 100 000 employees in order to study interactions between national cultures and organisational cultures (Hofstede, 2001). Five different dimensions of culture were discovered in this study of national work related values. Replication studies have found similar results, showing the stability and validity of the dimensions across time (Hofstede, 2001). The five dimensions are power distance, individualism, masculinity, uncertainty avoidance and long-term orientation (Hofstede, 2009). Power distance describes how less powerful members of organisations and institutions (like the family) accept and expect that power is distributed unequally. It does not measure a culture’s objective real power distribution but the way people perceive power differences (Hofstede, 2009).
Individualism identifies is the degree to which individuals are integrated into groups. Individualist cultures expect people to develop and display their individual personalities and to choose their own affiliations. In contrast to collectivist cultures, people are defined and act mostly as a member of a long-term group, such as family, an age cohort or a town. This dimension was found to approach the individualist end of the spectrum with increasing national wealth (Hofstede, 2001).

Masculinity deals with the role distribution between the genders. It places value on traditionally male or female values. In masculine cultures, people value competitiveness, assertiveness, ambition, and the accumulation of wealth and material possessions. To the contrary, in feminine cultures, people value relationships and quality of life. This dimension is often renamed with quantity of life vs. quality of life (Hofstede, 2009).

Uncertainty avoidance refers to the society’s tolerance for uncertainty and ambiguity. It deals with the anxiety of people about the unknown and attempt to cope with anxiety by minimising uncertainty. Strong uncertainty avoidance is characterised by people who prefer explicit rules and formally structured activities. Employees tend to remain longer with one employer and do not like changing conditions. Weak uncertainty avoidance is shown by people who prefer implicit or flexible rules or guidelines and informal activities.

Finally, long term orientation shows the society’s time horizon. In long term oriented societies, people value actions and attitudes that affect the future: persistence/perseverance. Whereas in short term oriented societies people value actions and attitudes that are affected by the past or the present.

Some researchers propose that the more different the culture, the more difficult it will be to adjust and perform for the expatriate (Black et al., 1992, Church, 1982, Mendenhall & Oddou, 1985, Torbiöörn, 1985). A meta-analysis showed that culture novelty and expatriates adjustment have a negative correlation among all dimensions of adjustment (general adjustment $r = .28$; interaction adjustment $r = .15$; work adjustment $r = .10$) (Bhaskar-Shrinivas et al., 2005). In a recent study Waxin (2004) investigated the relationship between adjustment and cultural
distance. It was found that among French, German, Korean and Scandinavian expatriate managers in India the culture of origin had a moderating effect on adjustment and its antecedents. Waxin (2004) showed that the more cultural distance between the European countries and India, the less adjustment occurred by the expatriates.

In contrast to that, Selmer (1997 & 2007) found that for expatriates both a distant and a similar culture might be equally challenging to adapt to. Yet, this was only a single, exploratory study, and as Selmer admits himself there is a need to study this issue further, e.g. in different cultural settings and over longer terms (Selmer, 2007). However, Ting-Toomey and Chung (2005) explain this phenomenon by stating that expatriates who assume cultural similarity can lead to a failure of realising the existing differences. Additionally, experiencing differences can result in a shock, since those dissimilarities were not expected hence the expatriate had no adequate training (Khan-Panni & Swallow, 2003). This is called the “psychic difference paradox” where “adjustment to a relatively similar culture may be as difficult as adjustment to a distant culture because differences are not anticipated” (Harrison et al., 2004, p. 228). From this paradox it is clear that culture novelty may not be a simple linear predictor of adjustment as suggested in some studies. Hence, companies should not offer less support for expatriates which are sent to a country that appears to have a similar culture.

2.6.3 Social support and networks

Social interaction is an important source of information about culturally acceptable norms and behaviours, hence reducing uncertainties associated with work and non-work situations (Briody & Chrisman, 1991; Feldman & Bolino, 1999). As already mentioned, social support helps in mobilising psychological resources and fosters cross-cultural adjustment. Social support has two main functions in respect to cross-cultural adjustment: socio-emotional and instrumental support. Socio-emotional support reduces loneliness and depression, whereas, instrumental support reduces the uncertainty associated with cultural transitions through information about social norms and regulations (Ong & Ward, 2005). Hence, being a source of information and assistance, social support helps to reduce uncertainty and supports adjustment (Adelman, 1988). Thus, the bigger
and closer the social network of an expatriate is, the easier it is to cross-culturally adjust (Wang & Kanungo, 2004).

2.7 Self-initiated expatriates vs. assigned expatriates

A self-directed expatriate is someone “who elects to go overseas independently” (Richardson, 2004, p. 469). Usually these are individuals who are relocating to foreign countries on a voluntary self-initiated basis and not for a temporary assignment (Thomas, Lazarova & Inkson, 2005, p. 341).

Self-initiated expatriates and sent expatriates differ in several ways. Suutari and Brewster (2000) state that the most important differences lie in the initiation of the assignment, the motivation for the assignment, the individual background variables, the employment situation, the types of jobs, the funding of the assignment and the career paths.

In respect to the motives for the foreign assignment, the biggest differences between self-initiated and sent expatriates is that some self-directed expatriates “search for a better personal and/or professional life” (Richardson & McKenna, 2002, p. 71), which usually not a motive among sent expatriates. In their research Suutari & Brewster (2000) found that in terms of individual characteristics there are several differences. Self-initiated expatriates are usually younger than sent expatriates. Among them there are usually a higher percentage of females and self-initiated expatriates usually have more previous overseas experience. Self-initiated expatriates tend to be single. However, if married the amount of spouses that were employed were almost double compared to the amount of spouses of assigned expatriates.

Expatriates are usually employed on a management level, whereas self-initiated can be found among all job levels (Suutari & Brewster, 2000). However, the biggest difference between these two types of expatriates is the fact that in cases of self-initiated expatriates companies from the home country do not support the expatriate. This leads to a number of implications. Firstly, the self-initiated expatriate has to pay for his or her own transfer expenses. Secondly, the failure of the assignment would not only lead to financial loss but as well can require the
self-initiated expatriate to leave the country. Whereas the sent expatriate can simply return home and might only lose a bonus (Richardson & McKenna, 2002). Thirdly, self-initiated expatriates do not receive the organisational support from the home company in terms of cross-cultural training, logistic support and language training (Reynolds, 2005).

Due to these differences it is questionable whether the adjustment model from Black and his colleagues (1991 & 1992) is applicable to self-initiated expatriates. Reynolds (2005) proposes that for self-initiated expatriates job and organisational factors should be more important than for sent expatriates. However, Richardson (2004) finds the role of family to be just as relevant to the decision process for self-initiated expatriates as for assigned expatriates.

Frostenlechner (2010) posits that self-initiated expatriates focus on the support received from the host-country instead of the organisational support. However, self-initiated expatriates usually stay on a permanent basis and become permanent immigrants (Ariss, 2009, p. 2). Hence, they will have a greater motivation to adapt to the local culture than expatriates (Gudykunst & Kim, 2003, p. 23). Therefore, it is proposed to treat them as immigrants rather then as expatriates. Thus, self-initiated expatriates will not be considered in this research study.

2.8 Model of factors influencing cross-cultural adjustment

Based on the discussion the developed model (see Figure 2.2) it is derived from the literature review and gives an overview of the most important categories of cross-cultural adjustment including the main factors for each category. Figure 2.2 was used as the foundation for the questionnaire, which asked aspects of each factor.
Figure 2.2:
Factors influencing cross-cultural adjustment

Source: Researchers’ own work
2.9 Concluding remarks

This chapter aimed to provide an overview on factors influencing the expatriate’s ability to cross-cultural adjust as well as the factors impacting on the adjustment. It focused on individual, organisational, job and non-work factors that influence this process. The focus was set on a micro-level focus of cross-cultural adjustment. Hence, it addressed the interpersonal and interpersonal experiences of individuals entering a new culture (Kim, 2001, p. 15). It aimed to discuss several factors influencing the adjustment process in order to give a wide-ranging overview and develop a comprehensive model.

The following chapter will address the research methodology used in the study.
CHAPTER 3
RESEARCH DESIGN

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3.2 Research method

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3.2.2 Quantitative research

3.3 Data collection

3.4 Measurement

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3.4.2 Reliability

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3.5.4 Sample design and sampling methods

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3.6 Data analysis

3.7 Sources of errors

3.8 Concluding remarks
CHAPTER 3

RESEARCH DESIGN

3.1 Introduction

The methodology is the basis for answering the research questions underlying the study. A literature study was conducted in chapter two to identify factors influencing cross-cultural adjustment. The research methodology will be discussed in this chapter.

The aim of this chapter is to illustrate the research methodology that was used during the empirical element of this study. Aspects of the design as well as the underpinning methodology are described and discussed to justify the quality and significance of the applied procedures.

Additionally, the process in which how the data was gathered will be explained, as well as how it was analysed and lastly what possible sources of errors exist.

3.2 Research method

There are three main reasons why researchers conduct research for exploratory, describing or explanatory reasons. Explorative research is usually done to formulate a problem, develop a hypothesis or test the feasibility of a research project. Descriptive research uses scientific observation to describe situations and events. Moreover, descriptive studies may lead to explanatory studies. Explanative studies aim to provide reasons for phenomena in the form of causal relationships. In order to conduct a causal relationship three requirements must be met. Firstly, the cause must precede the effect in time. Secondly, two variables must be empirically correlated with one another. Finally, the correlation must not be able to be explained by a third variable (spurious relationship) (Babbie, 2010).

Bless and Higson-Smith (2004, p. 3) define research as “a systematic investigation of a question, phenomenon, or problem using certain principles”. They postulate the following characteristics of research:
It is empirical since the aim is to know reality;
It is systematic and logical, and observations must therefore be done systematically and follow a logical sequence;
It is replicable and transmittable, which implies that given the same set of conditions, the study can be repeated yielding the same conclusion; and
It is reductive, i.e. all details that have little or no influence on the study are omitted.

The purpose of this research study at hand was to investigate the following problem:

**Which factors are critical for expatriates to succeed in their (foreign) assignments through cross-cultural adjustment?**

**Sub-problem 1**

To what extent do individual factors affect the expatriates' success to fully cross-culturally adjust?

**Sub-problem 2**

To what extent do organisational factors affect the expatriates' success to cross-culturally adjust?

**Sub-problem 3**

To what extent do job related variables influence the expatriates' success to cross-culturally adjust?

**Sub-problem 4**

To what extent do non-work related factors influence the expatriates' success to cross-culturally adjust?

**Sub-problem 5**

What factors expatriates perceive to be the most important factors of cross-cultural adjustment?
In order to solve the main problem a cross-sectional, descriptive study of expatriates in different countries was conducted.

In social science, the discussion whether qualitative or quantitative methods are more valid does not seem to be coming to an end (Johnson & Christensen, 2008, p. 34). Therefore, at this point the characteristics of both methodologies will be discussed briefly in order to determine the best fit for this research.

### 3.2.1 Qualitative research

Qualitative research can be defined as “any kind of research that produces findings not arrived by means of statistical procedures or other means of quantification” (Strauss & Corbin, 1990, p. 17). The data is collected by observations, interviews (individual, group or in-depth interviews) or personal documents such as autobiographies, diaries and letters.

The purpose of qualitative research is to describe and understand a specific field of interest. This research is inductive and idiographic, it starts from a single case study or observation and the aim is rather to understand the context than trying to make generalisations about a theoretical population (Babbie, 2010). The criticism towards qualitative methods is mostly based on aspects of validity and reliability. Furthermore, qualitative research might be perceived as rather subjective, due to the possible personal involvement of the researcher in a rather open study (Bryman, 2008).

Qualitative research is typically used in field and historical research. It usually uses grounded theory, analytic induction, narrative analysis, discourse analysis or content analysis to analysis data (Babbie, 2010).

### 3.2.2 Quantitative research

Quantitative analysis is the numerical representation and manipulation of observations for the purpose of describing and explaining the phenomena that those observations reflect. It is deductive (from the general to the detail), generalising and tries to control influencing factors. Quantitative descriptions are made in order to explain a field of interest and predict causal and statistical
relationships, which were suggested and formulated before by hypotheses (Babbie, 2010). Quantitative methods are mostly standardised procedures, trying to measure social phenomena by numbers and testing hypotheses through fixed variables. Due to these standardised methods, the results are applicable for rather large samples (Silverman, 2006, p.42).

Critics of quantitative methods might, however, argue that studies in this school of research tend to have little or no contact with the people and the variables may, furthermore, they might be perceived as being defined in a random way (Silverman 2006). Moreover, some phenomena or social processes are simply not measurable by numbers, through statistics or with random samples. In such cases using quantitative methods might rather limit the chances of discovering certain aspects of these phenomena (Silverman, 2006).

3.3 Data collection

The most frequently used techniques of data collection within the two basic research methods are (Brynhard & Hanekom, 2006, p. 38):

- Review of relevant literature
- Interviews
- Questionnaires
- Observation

The researcher chose to use a quantitative approach in order to address the research problems.

According to Babbie (2010, p. 254), surveys are the best method available to a social researcher who is interested in collecting data for describing a population too large to observe directly. There are two different survey methods available for social research: interviews and questionnaires (Trochim, 2006).

In this study a self-administered online questionnaire was chosen due to a number of reasons. It is easy to administer, it can assess private thoughts and feelings as well as behaviour in a private setting (Bailey, 1994, p. 150).
Moreover, questionnaires avoid the problems associated with interviewers. Lastly, respondents may be more willing to share personal or embarrassing information (Brewer, 2003, p.253).

3.4 Measurement

The measurement process is an integral part of social research (Bailey, 1994, p. 60). The success of the measurement process depends on the accuracy of the measurement instrument (Green, Tull & Albaum, 1988, p. 249). The accuracy of the measuring instrument not only influences the accuracy of results, but also the conclusions drawn and generalisations made from the study (Salkin, 2000, p. 105). Further it is, based on its validity and reliability (Fink & Litwin, 1995, p. 90).

3.4.1 Validity

Babbie (2010, p. 153) states that “validity refers to the extent to which an empirical measure adequately reflects the real meaning of the concept under consideration”. There are four different forms of validity: Face validity, criterion-related validity, construct validity and content validity (Salkin, 2000, p. 113).

Face validity is the most basic form of validity. It is concerned with the superficial appearance or face value of a measurement procedure (Babbie, 2010, p. 153).

Criterion-related validity (sometimes called predictive validity) is the extent to which a measure is related to some other standard or criterion that is known to indicate the construct correctly (Terre Blanche & Durheim, 1999, p. 83). A good example of criterion-related validity is given by Babbie (2010, p. 154). The validity of a written driver’s test is determined by the relationship between the scores people get on the test and their subsequent driving records.

Construct validity is “directly concerned with the theoretical relationship of a variable to other variables” (DeVellis, 2011, p.64). It is necessary to conduct three steps In order to establish the construct validity of a measure (Terre Blanche & Durheim, 1999, p. 87):
o Specify a set of theoretical relationships between constructs.
o Test these hypotheses theoretically.
o Interpret the pattern of relationships in terms of how they clarify the construct validity of measure.

Content validity is “the degree to which a measure covers the range of meaning included within a concept” (Babbie, 2010, p. 155).

Moreover, some authors include internal and external validity (Berg & Latin, 2008, p. 202). Internal validity refers to the freedom of researcher bias in forming conclusions in the view of collected data. External validity refers to the extent that conclusions made by the research can be generalised to the broader population and not merely applied to the sample studied.

The validity of the measurement used in the study at hand obtained the expertise of experienced people through a pilot study in order to ensure the validity of the measuring instrument.

3.4.2 Reliability

Joppe (2000, p. 1) defines reliability as the “extent to which results are consistent over time and an accurate representation of the total population under study is referred to as reliability and if the results of a study can be reproduced under a similar methodology, then the research instrument is considered to be reliable”. Three types of reliability have been identified in quantitative research (Kirk & Miller, 1986, p. 41-42):

o The degree to which a measurement, given repeatedly, remains the same
o The stability of a measurement over time; and
o The similarity of measurements within a given time period

Babbie (2010, p. 151-153) proposes some techniques that have been developed by social scientists to deal with the element of reliability: Test-retest method, split-half method, using established measures and/or reliability of research workers.
Singleton, Straits and Straits (1993, p. 121) state that reliability may be improved by conducting investigative studies in the sphere of interest or by performing pre-tests on a small sample of individuals similar in uniqueness to the target group.

In order to ensure reliability for the study at hand a pilot study was conducted as well as an established measure was used.

3.5 Conducting the empirical study

A large part of the information of this research was obtained through relevant books. A questionnaire was also designed to obtain views from the participants who were the focus of the research.

3.5.1 Questionnaire

The self-administered questionnaire consisted of three sections (see Appendix A). The first section of the questionnaire dealt with cross-cultural adjustment, more specifically, Black’s (1988) cross-cultural adjustment questionnaire was adopted. The questionnaire included fourteen questions. Seven items measured the general adjustment, four items were utilised to measure interaction adjustment and three items measure work adjustment. According to Black (1988) and Black and Stephens (1989) on general adjustment Cronbach alpha was as high as 0.80. The second factor was to focus on interaction adjustment and scored 0.86 in Cronbach alpha. Finally, the third factor focused on work adjustment, ranged on a Cronbach alpha of 0.90.

The first part consisted of closed-ended questions. A 5 point Likert scale was used (1 = strongly disagree to 5 = strongly agree) to identify the degree of cross-cultural adjustment. The reason for using closed-ended questions was to ease the statistical analysis. Closed-ended questions are more specific and prevent differences in interpretation (Babbie, 2010).

The second part of the questionnaire aimed to identify the perceived importance of factors influencing cross-cultural adjustment. Additionally, some questions identified the participant’s personal experience with the factors. The factors be divided into four parts. Each section deals with one identified main factor, which
influence cross-cultural adjustment: Individual factors, organisational factors, job factors and non-work characteristics. The section of the questionnaire mainly consist of closed-ended questions with a 5 point Likert scale. However, three questions required the participant to choose from a multiple choice menu.

The first part required the participants to indicate the degree they agree to the importance of each “Big Five” personality traits (extroversion, agreeableness, conscientiousness, emotional stability, openness) for cross-cultural adjustment. The next questions dealt with language knowledge and previous overseas experience.

The second part dealt with organisational factors influencing cross-cultural adjustment. This part always required participants to state the perceived importance of a factor and then the degree to which they experienced the factor.

The following two parts (job factors and non-related factors) were based on the same principle. Validity and reliability of the second section of the questionnaire was established through the pilot study.

The last section of the questionnaire dealt with the personal details of the participants.

In order to increase its validity and reliability, the questionnaire for this study was partly developed by integrating the research objectives, conceptual framework, hypotheses, and literature review.

### 3.5.2 Cover letter

The importance of a cover letter should not be underestimated (refer Appendix B). A well written cover letter is essential to persuade respondents to participate in the study (Babbie, 2010).

The main purpose of a cover letter is to introduce and explain the questionnaire to the participants. In case of an online questionnaire the cover letter is the researcher’s only medium for communicating with the recipient. Hence, a cover letter is even more important in case of an online survey. Table 3.1 gives an
overview about the items that should be addressed in the cover letter (Monette, Sullivan & DeJong, 2008, p. 152).

Table 3.1:

<table>
<thead>
<tr>
<th>Item</th>
<th>Cover letter</th>
<th>Interview introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor of the research</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Address/phone of the researcher</td>
<td>Yes</td>
<td>If required</td>
</tr>
<tr>
<td>How the respondent was selected</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Who else was selected</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>The purpose of the research</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Who will utilise or benefit from the research</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>An appeal for the person’s cooperation</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>How long it will take the respondent to complete the survey</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Payment</td>
<td>If given</td>
<td>If given</td>
</tr>
<tr>
<td>Anonymity /Confidentiality</td>
<td>If given</td>
<td>If given</td>
</tr>
<tr>
<td>Deadline for return</td>
<td>Yes</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

Source: Monette et al., 2008, p. 152

3.5.3 Pilot study

A pilot study (or feasibility study) was administered to establish the validity and reliability of the instruments. It is a small version of a full-scale study as well as the specific pre-testing of a particular research instrument (e.g. questionnaire or interview schedule) (van Teijlingen, Rennie, Hundley & Graham, 2001, p. 289). Moreover, it is a means to establish whether the survey can be administered and provide accurate data. Hence, a pilot study should answer the following questions (Cargan, 2007, p.116):

- Are there enough directions for those who conduct the survey to administer it, collect it, code it and report it?
- Are the procedures standardised?
- Is the necessary information being provided?
o Are the questions being asked appropriately for the people being surveyed?
o Is the information being obtained consistent?

In order to answer those questions, the pilot study must be conducted under the actual conditions of the survey. The sample must be similar to the sample selected for the survey. The validity must be tested by ensuring that all main topics have been included. Further, the reliability must be assessed by making sure the format of the questionnaire and the clarity of the questions being asked (Cargan, 2007). The aim of the pilot study was to identify problems with the construction of the questionnaire, to correct these problems and thereby limit the effect of bias due to the construction of the questionnaire.

In order to benefit from the pilot study the researcher sent out an online questionnaire to five expatriates for completion and comments. The expatriates were all originally from Germany and sent to different countries by their company (South Africa, Greece and Romania). The age of the expatriates was between 24 and 40. The pilot study sample consisted of three female participants and two male participants.

The participants have been asked for feedback in terms of the clarity and the format of the questions as well as in terms of content and completeness of the question. The participants provided feedback regarding suggested changes to the questionnaire, including:

- Rewording of one question in the second section of the questionnaire
- Changing one question type in the second section of the questionnaire
- Minor changes of the cover letter

However, the participants gave positive feedback about the layout, the format and the clarity as well as in respect to the completeness of the included factors.
3.5.4 Sample design and sampling methods

According to Brynard and Hanekom (2006: 54) the purpose of the sample is to:

- Simplify the research: it is easier to study a representative sample of a population than to study the whole population. Moreover, sometimes it is just impossible to take the whole population into account
- Save time: using a sample to study a population saves a lot of time, especially when it comes to large populations or those that cover a large geographical area
- Economical: it is always cheaper to collect information from a sample of the population than from the whole population

There are two general approaches to sampling used in social science research: probability sampling and non-probability sampling (Miller & Brewer, 2003, p. 268). Probability sampling occurs when all elements in the population have the same mathematical probability of being chosen. Moreover, the researcher uses a random selection method. Typical methods are systematic sampling, stratified random sampling, cluster sampling and panel sampling (Ary, Cheser, Razavieh & Sorensen, 2009, p. 150).

Non-probability sampling does not involve random selection and the elements of the research are selected on the basis of their availability. Typical methods are accidental sampling, purposive sampling, quota sampling, target sampling, snowball sampling, and spatial sampling (Babbie, 2010, p. 191-193).

It is extremely difficult to determine the sample population of this research. However, there is a consensus that the number of expatriates is increasing constantly (Adler & Bartholomew, 1992, p. 53; Black, Gregersen & Mendenhall, 1992, p. 59; Caligiuri, 2000a, p. 61-63). A survey conducted by Mercer (2009) showed that among 250 multinational companies almost 50 per cent increased the deployment of expatriates. Although, there is no specific number most authors refer to over 200 million expatriates worldwide (BDAE, 2011).

Purposive (or judgmental) and snowball sampling were used to conduct the research. Purposive sampling refers to a technique where the researcher
chooses subjects who are relevant to the research topic (Hall, 2008, p 195). The second approach to acquire participants used was snowball sampling. The researcher asked expatriates to identify further members of the population. This approach allows an effective way of researching populations that are difficult to identify (Hall, 2008, p. 195).

3.5.5 Questionnaire administration

To receive a high respondents rate expatriates who are part of the social network Xing were contacted. Xing offers members to be part of social groups. The researcher distributed the questionnaire including a cover letter in relevant groups (e.g. worldwide jobs outside Europe, Expat club, assignment service). Additionally participants were requested to share the questionnaire link with other expatriates and their own network in order to receive a higher respondent rate.

3.6 Data analysis

Appropriate descriptive statistical techniques were applied to the results of the empirical study. Descriptive statistical techniques are a branch of statistics which describe and analyse data without making inferences about a larger population. This analysis included percentages, frequencies, ranks, correlations, means and standard deviations. T-tests were used to determine the statistical differences based on sample means. The level of statistical significance was set at 0.05.

However, cross-cultural adjustment was the dependent variable and the factors (individual, organisational, job and non-work factors) were treated as independent variables.

The results of this statistical analysis is given in the next chapter where some questions in the questionnaire are treated separately and in many cases correlated with each other in order to draw conclusions from the data collected.

3.7 Possible sources of errors

Possible sources of errors in this study may result from the disadvantages of questionnaires. The data can be inaccurate due to a number of reasons:
Firstly, the respondents could provide false information for better self-perception or respondents could respond in a way that they assume the researcher might want them to respond (Bless & Higson-Smith, 2004, p. 122). In terms of this study, respondents could aim to appear more cross-culturally adjusted than they actually are.

Additionally, errors could emerge from the lack of flexibility that is inherent in questionnaires. Based on the fact that there is no interviewer present a variation of questions is impossible. Also if the respondent misunderstood the questions he or she can not be corrected (Bailey, 1994, p.149). Another possible bias results from the fact that self-administered questionnaires have no interviewer present to observe nonverbal behaviour or to make personal assessments concerning respondent’s ethnicity, social class, and other pertinent characteristics (Bailey, 1994, p. 150). Additionally, the interviewer has no control over the environment. In a mailed questionnaire study, the interviewer cannot be sure that the respondent will be able to complete the answers in private. Lastly, the researcher can create bias in their study. As Phenomenologists state, quantitative research is simply an artificial creation by the researcher, as it is asking only a limited amount of information without explanation. Moreover, there is a level of researcher imposition, meaning that when developing the questionnaire, the researcher is making their own decisions and assumptions as to what is and is not important (Popper, 2004, p. 2). However, in this study at hand an immense literature review was conducted in order to minimise this source of errors.

Lastly, the fact that snowball sampling was used can result in some errors or bias. Firstly, the researcher only has little control over the sampling method and the representation of the sample is not guaranteed. The researcher is not able to relate to the true distribution of the population and of the sample. Finally, there is the danger of a sampling bias because initial respondents tend to nominate people that share the same traits and characteristics (Babbie, 2010, p. 119).

3.8 Concluding remarks

This chapter described the survey method used in this study and the construction, testing and administering of the questionnaire. This was done by defining the
research method, the data collection process, the data analysis process and possible sources of errors and by minimising them.

In the following chapter the results of the empirical study will be presented, analysed and discussed.
CHAPTER 4: 
ANALYSIS, INTERPRETATION AND DISCUSSION OF RESEARCH RESULTS

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CHAPTER 4
ANALYSIS, INTERPRETATION AND DISCUSSION OF RESEARCH RESULTS

4.1 Introduction

This chapter depicts the results that were obtained through the self administered questionnaires. The chapter is divided into two sections. Section one shows the results of the questionnaires and section two discusses the results of both the survey questionnaire in relation to the research questions.

The aim of this research was to identify to what extent different factors influence cross-cultural adjustment. A literature study was conducted to determine the most common factors that influence cross cultural adjustment. The results obtained from the survey are presented according to the format of the questionnaire, starting with the sample profile for the respondents, followed by the results from each section of the questionnaire. Subsequently, the results will be analysed and discussed in order to answer the research questions.

Some questions of the questionnaire have been clustered into five main factors. Table 4.1 gives an overview of the factors, the questions they consist of and Cronbach’s alpha for each factor. All factors were tested on their internal consistency by making use of Cronbach’s alpha. A value above 0.7 is considered as consistent with three or more items (Babbie, 2010, p. 348).

The alphas for the three facets of adjustment (general, working and interaction) were 0.76 for general adjustment, 0.78 for interaction adjustment and 0.83 for work adjustment. These alphas are consistent with previous research done using this scale (e.g., Black & Stephens, 1989; Parker & McEvoy, 1993).
Table 4.1:
Overview factors, questions and Cronbach’s alpha

<table>
<thead>
<tr>
<th>Factor</th>
<th>Questions</th>
<th>Cronbach’s alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1: General adjustment</td>
<td>Section 1: 1, 2, 3, 4, 5, 6, 7</td>
<td>0.76</td>
</tr>
<tr>
<td>F2: Working adjustment</td>
<td>Section 1: 8, 9, 10</td>
<td>0.78</td>
</tr>
<tr>
<td>F3: Interaction adjustment</td>
<td>Section 1: 11, 12, 13, 14</td>
<td>0.83</td>
</tr>
<tr>
<td>F4: Perceived importance of organisational support</td>
<td>Section 2: 11, 13, 14, 16, 18</td>
<td>0.73</td>
</tr>
<tr>
<td>F5: Experienced organisational support</td>
<td>Section 2: 8, 15, 17, 19</td>
<td>0.77</td>
</tr>
</tbody>
</table>

Source: Researcher’s own work

4.2 Demographic characteristics of the research participants

The researcher targeted respondents who are currently on a foreign assignment or who have been sent on an assignment during their career. One of the requirements was that the duration of the foreign assignment was at least six months. In this section descriptive statistics were utilised to analyse demographic factors.

Of the 102 expatriates who answered the questionnaire, 74 were male (72.55%) and 28 were female (27.45%). The mean age was 42.75 years and the range was between 23 and 72 years. The median was 40.5 years and the standard deviation (SD) 12.46 years. 83 expatriates (81.37%) indicated that they were accompanied by a spouse/partner. Of those 83 expatriates 60 (58.82%) were married and 23 (22.55%) were living in a relationship. 16 expatriates were single (15.69%), two divorced (1.96%) and one widowed (0.98%) as can be seen in Table 4.2.
Table 4.2:

Biographic details of the participants

<table>
<thead>
<tr>
<th>Gender</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>74</td>
<td>72.55%</td>
</tr>
<tr>
<td>Female</td>
<td>28</td>
<td>27.45%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 - 29</td>
<td>13</td>
<td>12.75%</td>
</tr>
<tr>
<td>30 - 39</td>
<td>34</td>
<td>33.33%</td>
</tr>
<tr>
<td>40 - 49</td>
<td>28</td>
<td>27.45%</td>
</tr>
<tr>
<td>50 - 59</td>
<td>12</td>
<td>11.76%</td>
</tr>
<tr>
<td>60 - 69</td>
<td>13</td>
<td>12.75%</td>
</tr>
<tr>
<td>70 +</td>
<td>2</td>
<td>1.96%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Martial status</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single</td>
<td>16</td>
<td>15.69%</td>
</tr>
<tr>
<td>Married</td>
<td>60</td>
<td>58.82%</td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>23</td>
<td>22.55%</td>
</tr>
<tr>
<td>Divorced</td>
<td>2</td>
<td>1.96%</td>
</tr>
<tr>
<td>Widowed</td>
<td>1</td>
<td>0.98%</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 3)

44 expatriates (43.14%) had dependent children living with them. Chart 4.1 gives an overview of the number of dependent children on the foreign assignment.
82 respondents (80.39%) have had previous foreign assignment experience before being sent on their current or last assignment in question for this study. Out of the 82, 39 had been overseas once or twice, 16 three of four times and 27 five times or more. 20 expatriates have had no overseas experience previous to their current assignment. Chart 4.2 shows an overview about the previous overseas experience of the expatriates.
Chart 4.2:

Previous overseas experience

Source: Responses from questionnaire (section 2, question 10)

The countries of origin form the sample varied widely. However, most of the expatriates were German (n=71; 69.61%). This can be explained by the used approach of snowball sampling. Appendix C offers an overview about the different countries of origin as well as the pertinent host countries. Table 4.3 shows the different host countries in order of their occurrence.

Table 4.3: Host countries of participants

Sources: Responses from questionnaire (section 3, question 2)
Some biographical categories have been combined into bigger categories for reporting purpose. The marital category that was divided into four sub categories in the questionnaire was combined to form two sub categories. Expatriates who are married and expatriates who are living in a relationship are combined to form the living in a relationship category. Single, divorced and widowed expatriates were combined to form the single category. Similarly, the children category was divided into only no children and one or more.

4.3 Cross-cultural adjustment

Black’s (1988) cross-cultural adjustment questionnaire was used to identify the general, working and interaction cross-cultural adjustment of the participants. This theoretical framework of international adjustment covers the sociocultural aspects of adjustment.

As already mentioned the questionnaire consisted of a Likert scale. The questionnaire was coded from 1 to 5 (1 = not adjusted to 5 = completely adjusted). Therefore, the higher the score was the better the cross-cultural adjustment.

Table 4.4 shows the correlation among the general, working and interaction adjustment. All adjustment types were correlated; hence a participant who scores high on one type adjustment was likely to score high on both the other both adjustment types.

Table 4.4:
Correlation among general, working and interaction adjustment

<table>
<thead>
<tr>
<th></th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>General adjustment</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working adjustment</td>
<td>0.47</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Interaction adjustment</td>
<td>0.44</td>
<td>0.40</td>
<td>1</td>
</tr>
</tbody>
</table>

Sources: Responses from questionnaire (section 1)
However, these three facets of cross-cultural adjustment were the depended variables in this study. Therefore, the following part focuses purely on describing the degree of each type of adjustment whereby itemised into the demographic categories of gender, marital status and number of children. Due to the following sections the independent variables (individual, organisational, job and non-work related factors) and their relationship to the depended variable (each type of adjustment) are described, analysed and discussed with reference to conducted research.

4.3.1 General cross-cultural adjustment

General cross-cultural adjustment means adjustment to general living conditions, culture of the foreign country and logistic issues (Black, 1988). Table 4.5 gives an overview about the degree of general adjustment. The overall mean is 3.79 with a standard deviation (SD) of 0.63. From this it can be concluded that all participants were rather well adjusted.

Female expatriates were slightly higher cross-culturally adjusted in terms of general adjustment (Mean: 3.86; SD: 0.57), moreover expatriates living in a relationship were better adjusted (3.82; SD: 0.66). Additionally, expatriates who were not accompanied by children scored higher on the general adjustment scale.

Table: 4.5

General adjustment: mean, SD, median and T-test

<table>
<thead>
<tr>
<th>General Adjustment</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.79</td>
<td>0.63</td>
<td>3.86</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>3.86</td>
<td>0.57</td>
<td>3.86</td>
<td>0.24</td>
</tr>
<tr>
<td>Male</td>
<td>3.76</td>
<td>0.66</td>
<td>3.86</td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relation</td>
<td>3.82</td>
<td>0.66</td>
<td>3.86</td>
<td>0.15</td>
</tr>
<tr>
<td>Single</td>
<td>3.67</td>
<td>0.52</td>
<td>3.57</td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>3.82</td>
<td>0.58</td>
<td>3.86</td>
<td>0.33</td>
</tr>
<tr>
<td>Children</td>
<td>3.76</td>
<td>0.7</td>
<td>3.86</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 1, F1)
An independent-sample T-test was performed to evaluate the relationship between general cross-cultural adjustment of male expatriates as opposed to female expatriates, singles and couples and expatriates with and without children. The tests showed that there was no significant difference between these variables.

4.3.2 Work adjustment

Work adjustment refers to job responsibilities, supervision and performance expectations. Work adjustment is seen as the easiest of the three dimensions to adjust to. The work adjustment process is supported by similarities in work procedures, policies and requirements of the foreign and parent company (Black et al., 1992).

Table 4.6 gives an overview of parameter value for work adjustment. The overall work adjustment was 3.75 (SD: 0.86). Female expatriates (mean: 3.76; SD: 0.85) were slightly higher work adjusted than female expatriates (mean: 3.74; SD: 0.87). Expatriates living in a relationship scored significantly higher on this scale than single expatriates (p = 0.01). Moreover, expatriates with children (mean: 3.87; SD: 0.89) scored higher on the work adjustment scale than expatriates without children.

Table 4.6:

<table>
<thead>
<tr>
<th>Work adjustment: mean, SD, median and T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Adjustment</strong></td>
</tr>
<tr>
<td><strong>Overall</strong></td>
</tr>
<tr>
<td>Mean</td>
</tr>
<tr>
<td>3.75</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td>Mean</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td><strong>Marital status</strong></td>
</tr>
<tr>
<td>Mean</td>
</tr>
<tr>
<td>Living in a relationship</td>
</tr>
<tr>
<td>Single</td>
</tr>
<tr>
<td><strong>Children</strong></td>
</tr>
<tr>
<td>Mean</td>
</tr>
<tr>
<td>None</td>
</tr>
<tr>
<td>Children</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 1, F2)
When splitting up the marital status again in single, living in a relationship and married a positive correlation was found between being married and work adjustment. The Tukey HSD test showed a significant difference between married and single people with married being significantly better work adjusted. Due to the high extent of spousal adjustment among married expatriates in this study (median: 3.66; SD: 1.23; see Table 4.21).

This is most likely due to the fact that research has shown that a well adjusted spouse has a significant impact on the partner’s ability to cross-cultural adjustment. However, this is discussed and analysed in more detail below.

4.3.3 Interaction adjustment

Interaction adjustment deals with the process of adapting to socialising and speaking with nationals of the host country. This adjustment is seen as the most difficult one. In contact with the people from the host-country different perceptions, beliefs and values emerge hence it is most likely that those differences lead to misunderstandings and conflicts. This in turn can lead to anxiety, anger and depression, which will hinder adjustment (Chang, 1996, p. 151).

Table 4.7:

Interaction adjustment: mean, SD and median

<table>
<thead>
<tr>
<th>Interaction Adjustment</th>
<th>Overall</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td></td>
<td>3.67</td>
<td>0.89</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td>3.8</td>
<td>0.89</td>
<td>4</td>
<td>0.18</td>
</tr>
<tr>
<td>Male</td>
<td></td>
<td>3.62</td>
<td>0.89</td>
<td>3.75</td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td></td>
<td>3.76</td>
<td>0.88</td>
<td>4</td>
<td>0.02</td>
</tr>
<tr>
<td>Single</td>
<td></td>
<td>3.29</td>
<td>0.85</td>
<td>3.25</td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td>3.67</td>
<td>0.8</td>
<td>3.88</td>
<td>0.49</td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td>3.67</td>
<td>0.99</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 1, F3)
Table 4.7 gives an overview of the parameter value of interaction adjustment. The overall mean was 3.67 (SD: 0.89). Female expatriates scored higher (mean: 3.8; SD: 0.89) than male expatriates. Moreover, expatriates who were living in a relationship scored significantly higher than their single counterpart (p = 0.02).

4.4 Individual factors

Research has identified certain traits and characteristics as predictors of expatriates' success in foreign assignments (Caligiuri, 2000a & b; Morley et al., 2004, p. 206; Ramalu, Rose & Uli, 2010).

4.4.1 “Big Five” characteristics

The “Big Five” personality factors are extroversion, agreeableness, conscientiousness, emotional stability and openness (McCrae & Costa, 1989).

The second part of the questionnaire aimed to identify the perceived importance of factors influencing cross-cultural adjustment. The first part of this section asked participations to state which of the “Big Five” personality traits they perceived to be most important to support cross-cultural adjustment. Table 4.8 shows the different means, median and standard deviation for each “Big Five” factor.

Table 4.8:

<table>
<thead>
<tr>
<th>“Big Five”: Mean, SD and median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extroversion</td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Agreeableness</td>
</tr>
<tr>
<td>Conscientiousness</td>
</tr>
<tr>
<td>Emotional stability</td>
</tr>
<tr>
<td>Openness</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 1 – 5)

In this study, most participants identified the openness for new experience as the most important trait for cross-cultural adjustment (Mean: 4.33; SD: 0.87). Openness to experience refers to the willingness to accept new and unconventional ways of thinking and behaving, manifested in such traits as
creativity, imaginativeness, curiosity, and aesthetic appreciation (McCrae & Sutin, 2009, p. 257). Preceding openness was agreeableness (mean: 4.29; SD: 0.67), emotional stability (mean: 4.25; SD: 0.91), extroversion (mean: 4.05, SD: 0.87) and conscientiousness (mean: 3.76, SD: 1). An independent-sample T-test was performed to evaluate the relationship between the perceived importance of the “Big Five” personality traits and gender. The test revealed that women perceived extroversion as significantly more important than their male counterparts. The same is true for emotional stability as can be seen from Table 4.9.

This significant difference is surprising as previous research has shown that women consistently report higher on neuroticism (antonym of emotional stability) and agreeableness, and men often report higher on extraversion and conscientiousness (Schmitt, Realo, Voracek & Allik, 2008). However, this does not explain the significant differences in the perceived importance of extroversion and emotional stability for cross-cultural adjustment.

**Table 4.9:**

“Big five” and gender differences (mean, SD, median and T-test)

<table>
<thead>
<tr>
<th></th>
<th>Gender</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extroversion</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.43</td>
<td>0.74</td>
<td>5</td>
<td></td>
<td>0.001905</td>
</tr>
<tr>
<td>Male</td>
<td>3.91</td>
<td>0.88</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Agreeableness</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.36</td>
<td>0.68</td>
<td>4</td>
<td></td>
<td>0.28</td>
</tr>
<tr>
<td>Male</td>
<td>4.27</td>
<td>0.67</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Conscientiousness</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>3.79</td>
<td>1.03</td>
<td>4</td>
<td></td>
<td>0.45</td>
</tr>
<tr>
<td>Male</td>
<td>3.76</td>
<td>0.99</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Emotional stability</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.68</td>
<td>0.55</td>
<td>5</td>
<td></td>
<td>0.000127</td>
</tr>
<tr>
<td>Male</td>
<td>4.09</td>
<td>0.97</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Openness for new experience</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.43</td>
<td>0.74</td>
<td>5</td>
<td></td>
<td>0.23</td>
</tr>
<tr>
<td>Male</td>
<td>4.30</td>
<td>0.92</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 1 – 5)
4.4.2 Language knowledge

Expatriates were asked to indicate to what extent they agree that the ability to speak the host language is important for cross-cultural adjustment. The participants strongly agreed to this statement with a mean of 4.58 (SD: 0.78) as shown in Table 4.10. Female expatriates valued the ability to speak the host language significantly higher than male expatriates (p = .046).

Table 4.10:

Perceived importance of language knowledge (mean, SD and median)

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>4.58</td>
<td>0.78</td>
<td>5</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.75</td>
<td>0.52</td>
<td>5</td>
</tr>
<tr>
<td>Male</td>
<td>4.51</td>
<td>0.85</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 6)

Additionally, participants were asked to indicate their ability to speak the host language ranging from basic knowledge (1) to bilingual or native language (5). Most of the participants had a proficient level of language knowledge (Mean: 3.18, SD: 1.29). Female participants scored slightly higher. However, this difference is not significant, as can be seen in Table 4.11.

Table 4.11:

Perceived importance of language knowledge (mean, SD and median)

<table>
<thead>
<tr>
<th>Ability to speak the host language</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.18</td>
<td>1.29</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>3.36</td>
<td>1.16</td>
<td>4</td>
<td>0.18</td>
</tr>
<tr>
<td>Male</td>
<td>3.11</td>
<td>1.33</td>
<td>3.5</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 6)
4.4.3 Previous overseas experience

In the question the expatriates had to indicate their previous overseas experience. Table 4.12 shows the different means, standard deviation for the amount of previous overseas experience and for each of the three adjustments types.

Expatriates who have had previous overseas experience between three and four times scored higher on general (Mean: 3.96; SD: 0.63) and working adjustment (Mean: 4.08; SD: 0.66). Whereas people with no previous overseas experience scored the highest among interaction adjustment (Mean: 3.93; SD: 0.83).

Table 4.12:

<table>
<thead>
<tr>
<th>Overseas experience</th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Means</td>
<td>No</td>
<td>SD</td>
</tr>
<tr>
<td>None</td>
<td>3.84</td>
<td>20</td>
<td>0.68</td>
</tr>
<tr>
<td>Yes, 1 - 2</td>
<td>3.73</td>
<td>39</td>
<td>0.56</td>
</tr>
<tr>
<td>Yes, 3 - 4</td>
<td>3.96</td>
<td>16</td>
<td>0.63</td>
</tr>
<tr>
<td>Yes, 5 +</td>
<td>3.73</td>
<td>27</td>
<td>0.72</td>
</tr>
<tr>
<td>Overall</td>
<td>3.79</td>
<td>102</td>
<td>0.63</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 6 and F1, F2, F3)

4.5 Organisational factors

As reported in Table 4.1 most of the questions relating to organisational support were combined in two different factors. More specifically, perceived importance of organisational support and experienced organisational support. The results of each factor will be described first. In addition, the results of the questions relating to organisational support which did not fit into factors will be described.

4.5.1 Perceived importance of organisational support

Perceived importance of organisational support (Cronbach’s alpha: 0.73) included the following factors in terms of the perceived importance for cross-cultural adjustment:

- Pre-departure cross-cultural training provide by the organisation
o Supporting practices for expatriates (e.g. training, logistical support, family support)
o The parent’s company interest in the well-being of the expatriate
o Similarity between the host and parent company’s culture

Table 4.13:

Perceived importance of organisational support (means, median, SD and T-test)

<table>
<thead>
<tr>
<th>Perceived organisational support</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>4.05</td>
<td>0.64</td>
<td>4</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.14</td>
<td>0.64</td>
<td>4.2</td>
</tr>
<tr>
<td>Male</td>
<td>4.02</td>
<td>0.64</td>
<td>4</td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>4.06</td>
<td>0.67</td>
<td>4</td>
</tr>
<tr>
<td>Single</td>
<td>4.02</td>
<td>0.5</td>
<td>4.2</td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>4.04</td>
<td>0.64</td>
<td>4</td>
</tr>
<tr>
<td>Children</td>
<td>4.05</td>
<td>0.64</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (F4)

The overall mean was 4.05 (SD: 0.64) which indicates that most of the expatriates stated that organisational support is essential for cross-cultural adjustment. However, this does not indicate that expatriates received this support. Table 4.13 shows the different means, SD and medians for perceived organisational support itemised in gender, marital status and number of children on the foreign assignment. However, none of the differences was significant.

4.5.2 Experienced organisational support

Experienced organisational support (Cronbach’s alpha: .77) included the following factors:

- Host-language training
- Taking care of the expatriates while being on the foreign assignment
- Offered support such as training, logistical support and family support
- Similarity between host and parent organisational culture

**Table 4.14:**

** Experienced organisational support (means, median, SD and T-test) **

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.93</td>
<td>1.06</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>2.5</td>
<td>1.02</td>
<td>2.5</td>
<td>0.006</td>
</tr>
<tr>
<td>Male</td>
<td>3.09</td>
<td>1.04</td>
<td>3.25</td>
<td></td>
</tr>
<tr>
<td><strong>Marital status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>2.98</td>
<td>1.09</td>
<td>3</td>
<td>0.15</td>
</tr>
<tr>
<td>Single</td>
<td>2.7</td>
<td>0.92</td>
<td>2.75</td>
<td></td>
</tr>
<tr>
<td><strong>Children</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>2.72</td>
<td>1.05</td>
<td>2.75</td>
<td>0.01</td>
</tr>
<tr>
<td>Children</td>
<td>3.2</td>
<td>1.03</td>
<td>3.25</td>
<td></td>
</tr>
</tbody>
</table>

**Source:** Responses from questionnaire (F5)

The overall mean was low (2.93) although it had a high standard deviation (1.06). When comparing the means between female and male expatriates a significant difference was found ($p = 0.006$). In this study, female expatriates received significantly less organisational support than male expatriates as shown in Table 4.14.

Moreover, expatriates accompanied by children received significantly more organisational support than their childless counterparts ($p = 0.01$). This differences might be based on the fact that employer acknowledge that it is more difficult for families with children to cross-culturally adjust, hence the organisation might provide more training to ease this process. Additionally, employers are usually required to find schools for the children and this is probably interpreted as further organisational support by the expatriates. Previous research has shown that all four aspects of organisational support ease cross-cultural adjustment (Copeland & Norell, 2002, p. 255; Suutari & Brewster, 2004, p. 192).
4.5.3 Received cross-cultural training

Cross-cultural training has been identified as one of the most essential factors for cross-cultural adjustment and it is evident that cross-cultural training is effective in facilitating success on expatriate assignments (Littrell et al., 2006, p. 355). It was found that if cross-cultural training is competently managed and well executed it can be a key intervention in promoting assignment success, averting failure and increasing the return on investment for all parties involved: the employee, the family members and the company (Bennett et al., 2000).

Due to this fact, cross-cultural training was treated as a single factor. Participants were asked to indicate the degree of cross-cultural training they received ranking between none and more than a week. Even though it is has been established by previous research that cross-cultural training is essential almost half of the participants did not receive any cross-cultural training (48%). Chart 4.3 gives an overview of the amount of cross-cultural training received by the participants. Only 10 per cent of the participants received more than a week of training.

Chart 4.3:

Received amount of cross-cultural training in days

Source: Responses from questionnaire (section 2, question 12)
In order to be able to detect if there was a significant relationship between cross-cultural training and adjustment the answers were combined to no, between one and two days and more than two days of cross-cultural training received.

Table 4.15:

Received training (in days) and adjustment (Means and SD)

<table>
<thead>
<tr>
<th></th>
<th>General adjustment</th>
<th>Work adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Means</td>
<td>SD</td>
<td>Means</td>
</tr>
<tr>
<td>Overall</td>
<td>3.79</td>
<td>0.63</td>
<td>3.75</td>
</tr>
<tr>
<td>0</td>
<td>3.72</td>
<td>0.77</td>
<td>3.67</td>
</tr>
<tr>
<td>Between 1 and 2</td>
<td>4.01</td>
<td>0.38</td>
<td>3.62</td>
</tr>
<tr>
<td>More</td>
<td>3.74</td>
<td>0.50</td>
<td>3.96</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 12 and F1, F2, F3)

Table 4.15 indicates the means and standard deviation for the amount of training and each of the adjustment types.

4.6 Job factors

Research postulates that certain job factors can influence expatriates' ability to cross-culturally adjust (Morely et al., 2004, p. 207). Obviously, it would be expected that the highest influence is on work adjustment. Job factors include degree of role novelty, role clarity, role discretion, role conflict and role overload (Morley et al., 2004, p. 205-208).

4.6.1 Perceived importance of job factors

When asked to indicate the perceived importance of job factors and to what extent the job factors influence cross-cultural adjustment the overall mean was 3.82 (SD:0.88). This indicates a high perceived importance of job factors in respect of cross-cultural adjustment. Table 4.16 shows the different means, median and standard deviation itemised after biographical factors.
Table 4.16:

Perceived importance of job factors (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Perceived job factor importance</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.82</td>
<td>0.88</td>
<td>4</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>3.93</td>
<td>0.81</td>
<td>4</td>
</tr>
<tr>
<td>Male</td>
<td>3.78</td>
<td>0.91</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>0.22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>3.77</td>
<td>0.86</td>
<td>4</td>
</tr>
<tr>
<td>Single</td>
<td>4.05</td>
<td>0.97</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>0.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>3.78</td>
<td>0.88</td>
<td>4</td>
</tr>
<tr>
<td>Children</td>
<td>3.89</td>
<td>0.89</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>0.3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 20)

An independent sample T-test was performed to evaluate the relationship between perceived importance of job factors of male expatriates as opposed to female expatriates, singles and couples and expatriates with and without children. The tests showed that there was no significant difference between the variables.

4.6.2 Experienced job problems

The next question asked participants to indicate whether they experienced problems with the new job in terms of role novelty, role clarity, role discretion, role conflict and/or role overload. The overall mean was 3.51 (SD: 1.26). This indicates that most expatriates did not experience problems in terms of job factors.

However, female expatriates scored significant lower (p = 0.0036) than male expatriates, and thus, female expatriates experienced greater difficulties dealing with the new job. There were not significant differences among couples and single and child and childless expatriates, as can be seen in Table 4.17.
Table 4.17:

Job factors (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Job factors</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall</strong></td>
<td>3.51</td>
<td>1.26</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td>0.036</td>
</tr>
<tr>
<td>Female</td>
<td>3.14</td>
<td>1.24</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>3.65</td>
<td>1.24</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td><strong>Marital status</strong></td>
<td></td>
<td></td>
<td></td>
<td>0.25</td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>3.47</td>
<td>1.29</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>3.68</td>
<td>1.11</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td><strong>Children</strong></td>
<td></td>
<td></td>
<td></td>
<td>0.12</td>
</tr>
<tr>
<td>None</td>
<td>3.38</td>
<td>1.25</td>
<td>3.5</td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td>3.68</td>
<td>1.25</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 21 and F1, F2, F3)

4.7 Non-work factors

Research has shown that certain factors which are not related to work have a significant influence on expatriate’s ability to cross-cultural adjustment (Morley et al., 2004, p. 209). The most important ones are spousal and family adjustment and social networks (Haslberger, 2005).

4.7.1 Spousal adjustment

Participants were asked to indicate the perceived importance of spousal adjustment.

Table 4.18 shows the different means for the perceived importance of spousal adjustment. Not surprisingly, expatriates living in a relationship assessed the importance of spousal adjustment significantly higher than single expatriates (p = 0.005).
Table 4.18:

Perceived importance of spousal adjustment (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Importance of spousal adjustment</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>4.25</td>
<td>0.86</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.18</td>
<td>0.82</td>
<td>4</td>
<td>0.28</td>
</tr>
<tr>
<td>Male</td>
<td>4.28</td>
<td>0.88</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>4.39</td>
<td>0.76</td>
<td>5</td>
<td>0.005</td>
</tr>
<tr>
<td>Single</td>
<td>3.68</td>
<td>1.06</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>4.03</td>
<td>0.94</td>
<td>4</td>
<td>0.0008</td>
</tr>
<tr>
<td>Children</td>
<td>4.55</td>
<td>0.66</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 22)

When the distinction was drawn between married expatriates and expatriates living in a relationship the Tukey HSD Test revealed a significant difference between the score of married expatriates compared to the score expatriates who live in a relationship and single expatriates.

Moreover, expatriates with children scored significantly higher on this scale (p = 0.0008). These results are not surprising because couples and expatriates with children depend more on the adjustment of their partners than single expatriates and expatriates with no children.

In this study 83 expatriates were accompanied by a partner or spousal. 22 of them were females. Further, 41 expatriates were accompanied by children as is shown from Table 4.19. Among them, the overall degree of spousal adjustment was indicated with a mean of 3.66 (SD: 1.23). Table 4.20 gives an overview about the different means, standard deviation and median itemised by biographical factors.
Table 4.19:

Biographic data of expatriates living in a relationship

<table>
<thead>
<tr>
<th>Gender</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>60</td>
<td>72.29%</td>
</tr>
<tr>
<td>Female</td>
<td>22</td>
<td>26.51%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Children</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>42</td>
<td>50.60%</td>
</tr>
<tr>
<td>one and more</td>
<td>41</td>
<td>49.40%</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 3, question 3)

Female expatriates indicated a significantly higher score on spousal adjustment ($p = 0.01$). Since, it were the expatriates who were required to state the adjustment of their spousal this score mirrors only the assumed spousal adjustment. In order to detect the true score on spousal adjustment, it would be necessary to interview the spousal of the expatriates.

Table 4.20:

Spousal adjustment (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Spousal adjustment</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.66</td>
<td>1.23</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>4.14</td>
<td>1.04</td>
<td>4.5</td>
<td>0.01</td>
</tr>
<tr>
<td>Male</td>
<td>3.49</td>
<td>1.26</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Children</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>3.48</td>
<td>1.25</td>
<td>3</td>
<td>0.08</td>
</tr>
<tr>
<td>Children</td>
<td>3.85</td>
<td>1.2</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 23)

4.7.2 Social networks

The importance of social networks for cross-cultural adjustment was widely acknowledged by the participants with a mean of 4.23 (SD: 0.78).
Table 4.21:

Perceived importance of social networks (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Importance of social networks</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>4.23</td>
<td>0.78</td>
<td>4</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>4.5</td>
<td>0.69</td>
<td>5</td>
</tr>
<tr>
<td>Male</td>
<td>4.12</td>
<td>0.79</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>0.0143</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Living in a relationship</td>
<td>4.27</td>
<td>0.81</td>
<td>4</td>
</tr>
<tr>
<td>Single</td>
<td>4.05</td>
<td>0.62</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>1.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>4.19</td>
<td>0.78</td>
<td>4</td>
</tr>
<tr>
<td>Children</td>
<td>4.27</td>
<td>0.79</td>
<td>4</td>
</tr>
<tr>
<td>T-test</td>
<td>0.3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 24)

Female expatriates perceived social networks to be significantly more important than male expatriates (p = 0.0143) as can be seen in Table 4.21. The other perception differences were not significant.

Participants were asked as well to indicate whether they have a social network on the assignment. This mean (3.56; SD: 1.07) was lower than the one for perceived importance of social networks. Female expatriates had a significantly higher score than male expatriates (p = 0.033). Moreover, expatriates living in a relationship scored higher than single expatriates as can be seen in Table 4.22.

Table 4.22:

Social networks (Mean, median, SD and T-test)

<table>
<thead>
<tr>
<th>Social networks</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.56</td>
<td>1.07</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>3.89</td>
<td>1.13</td>
<td>4</td>
<td>0.033</td>
</tr>
<tr>
<td>Male</td>
<td>3.43</td>
<td>1.02</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
### Table 4.23

<table>
<thead>
<tr>
<th>Marital status</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living in a relationship</td>
<td>3.53</td>
<td>1.05</td>
<td>4</td>
<td>0.29</td>
</tr>
<tr>
<td>Single</td>
<td>3.68</td>
<td>1.16</td>
<td>4</td>
<td>0.09</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Children</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
<th>T-test</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>3.64</td>
<td>1.13</td>
<td>4</td>
<td>0.19</td>
</tr>
<tr>
<td>Children</td>
<td>3.45</td>
<td>0.98</td>
<td>3.5</td>
<td>0.19</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 25)

4.8 Analysis and interpretation of the results

This section combines both the research findings of the survey and the literature study. The results of the research findings are discussed in relation to the research questions.

4.8.1 Individual factors

With the first research question the researcher aimed to identify to what extent individual factors affect the expatriates' success to fully cross-culturally adjust.

4.8.1.1 “Big Five” and cross-cultural adjustment

A significant correlation between perceived importance of some “Big Five” personality traits and the ability to cross-cultural adjust was found (Table 4.23). This is in line with previous research conducted by several authors (Ramalu et al., 2010; Stroh & Caligiuri, 1998, p. 5; Huang, Chi & Lawler, 2005). In the study at hand all “Big Five” personality traits have been found to have a positive correlation to expatriates success and the ability to cross-cultural adjust.

Expatriates who identified extroversion as an important trait for cross-cultural adjustment were significantly better cross-cultural adjusted in respect to all three facets of adjustment (r = .21; r = .20; r = .35), as shown in Table 4.23. This is in line with research, which shows that expatriates who scored high on extraversion could adjust better in the general environment (Ramalu et al., 2010). Moreover, extroversion has to be shown to have a negative correlation with the desire to terminate the foreign assignment (Caligiuri, 2000b).
Table 4.23: 
Correlation between adjustment and the “Big Five” personality traits

<table>
<thead>
<tr>
<th></th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extroversion</td>
<td>0.21</td>
<td>0.20</td>
<td>0.35</td>
</tr>
<tr>
<td>Agreeableness</td>
<td>0.05</td>
<td>0.12</td>
<td>0.32</td>
</tr>
<tr>
<td>Conscientiousness</td>
<td>0.15</td>
<td>0.26</td>
<td>0.30</td>
</tr>
<tr>
<td>Emotional stability</td>
<td>-0.01</td>
<td>0.07</td>
<td>-0.05</td>
</tr>
<tr>
<td>Openness</td>
<td>0.25</td>
<td>0.17</td>
<td>0.02</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 1 – 5 and F1, F2, F3)

Participants who identified agreeableness as an important factor were significantly better adjusted in terms of interaction adjustment ($r = .32$). This is in line with research that stated a high score on agreeableness is associated with greater interaction adjustment (Swagler & Jome, 2005; Ward, Leong & Low, 2004).

A significant relationship was found between perceived importance of conscientiousness and working ($r = 0.26$) as well as interaction ($r = .30$) adjustment. This significance has been shown as well in several studies (see for example: Caligiuri, 2000b; Ramalu et al., 2010).

No significant relationship was detected between emotional stability and any of the three adjustments types. This is surprising, since research has shown that foreign assignments increase stress on expatriates and emotional stability is defined as the ability to handle stress (Stroh & Caligiuri, 1998, p. 5). Hence, emotional stability has to been found to have a positive, significant relationship to cross-cultural adjustment (Caligiuri, 2000b).

Lastly, expatriates who stated that openness for new experience is important for cross-cultural adjustment scored higher on general adjustment. This goes in line with research that states that openness for new experiences is positively related to general adjustment (Caligiuri, 2000b).
4.8.1.2 Language knowledge

Based on the contact hypothesis or association hypothesis it is evidently that language is an elemental factor for cross-cultural adjustment (Ramalu et al., 2010). Hence, it is not surprising that a significant relationship was shown between the ability to speak the host language and all three facets of adjustment (Table 4.24).

Table 4.24:

<table>
<thead>
<tr>
<th>Ability to speak the host language</th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.31</td>
<td>0.31</td>
<td>0.45</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 6 and F1, F2, F3)

The significance of language skills for cross-cultural adjustment, has been confirmed in many studies (Andreason, 2008, p. 387; Caligiuri, 2000a, p. 66; Kraimer et al., 2001, p. 90; Tanake et al., 2002, p. 15).

4.8.1.3 Previous overseas experience

Previous research has identified overseas experience as a major factor in terms of cross-cultural adjustment (Black et al., 1991; Church, 1982). Most of the participants perceived previous overseas experience as very important (Mean: 4.05; SD: 0.98). However, there was no significant relationship between the perceived importance of previous overseas experience and any of the adjustments in the study at hand.

Based on the fact that it has been shown that people with overseas experience are able to draw from their previous experience in a new situation and thereby being able to reduce stress research suggests that there is a relationship between previous overseas experience and cross-cultural adjustment (Cai & Rodriguez, 1996, p. 30-31). However, no research has identified which type of adjustment is influenced by previous overseas experience. In this study no
significant relationship was found between previous overseas experience and any type of adjustment.

**4.8.2 Organisational factors**

The second research question dealt with organisational factors and the influence on cross-cultural adjustment. Organisational factors were divided into perceived organisational support, experienced organisational support and received cross-cultural training.

Although, organisational support was perceived to be very important (mean: 4.05), in this study there was no significant relationship between the perceived importance of organisational support and any of the adjustment types, as can be seen in Table 4.25.

<table>
<thead>
<tr>
<th>Perceived importance of organisational support</th>
<th>General adjustment</th>
<th>Work adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.06</td>
<td>0.05</td>
<td>-0.0040</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (F4 and F1, F2, F3)

Surprisingly, there was as well no significant relationship found between the experienced organisational support and the degree of cross-cultural adjustment, as indicated in Table 4.26.

This is probably based on the low amount of organisational support that has been experienced by the participants (mean: 2.93).

The amount of cross-cultural training received before the assignment had no significant relationship with the extent of cross-cultural adjustment. Table 4.16 shows the amount of received training in relationship with the means and standard deviation of the different adjustment types. No relationship has been
detected between the amount of training and adjustment. This is surprising since previous research revealed that training supports cross-cultural adjustment in various ways. Firstly, it helps to reduce cultural based stress, since it reduces uncertainty associated with the transition and facilitates the formation of accurate expectations (Moreley et al., 2004, p. 208). Secondly, it helps expatriates to figure out appropriate behaviour in the new culture and expected ways how to perform the job in the host country. Thirdly, cross-cultural training should enable expatriates to deal with unforeseen situations in the new culture and thereby, reduce conflict. Lastly, training will help expatriates to have realistic expectations in respect to living and working in the host country (Caligiuri et al., 2001, p. 358).

Table 4.26:

<table>
<thead>
<tr>
<th>Correlation between adjustment and experienced organisational support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experienced organisational support</td>
</tr>
<tr>
<td>General adjustment</td>
</tr>
<tr>
<td>Work adjustment</td>
</tr>
<tr>
<td>Interaction adjustment</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (F5 and F1, F2, F3)

However, the fact that no significant relationship was found can be based on the fact that the participants received very little cross-cultural training and almost half of the participants (48%) did not receive any cross-cultural training.

4.8.3 Job factors

The third research question aimed to identify to what extent do job related variables influence the expatriates' success to cross-culturally adjust?

Not surprisingly, a significant relationship was found between job factors and work adjustment ($r = .20$). This is in line with research that states that job factors do significantly influence work adjustment (Hechanova-Alampay et al., 2001, p. 148). No relationship was found between perceived importance of job factors and actual adjustment scores, as can be seen from Table 4.27.
Table 4.27:

Correlation between adjustment and job factors and perceived importance of job factors

<table>
<thead>
<tr>
<th>Job factors and adjustment</th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived importance</td>
<td>-0.05</td>
<td>0.07</td>
<td>-0.05</td>
</tr>
<tr>
<td>Job factors</td>
<td>0.09</td>
<td>0.20</td>
<td>0.16</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (section 2, question 20 and F1, F2, F3)

4.8.4 Non-work related factors

Research question four aimed to identify to what extent non-work related factors influence the expatriates' success to cross-culturally adjust.

Several researchers were able to show that the spouse’s ability to cross-culturally adjust has significant impact on the success of the assignment. It was found that spouse adjustment is positively related to the general adjustment of the expatriates \( r = .34 \) (Shaffer et al., 1999) and interaction adjustment \( r = .23 \) (Bonsiep et al., 2003). In the research at hand among all participants (single and couples) it was acknowledged that spousal adjustment is important for cross-cultural adjustment. Not surprisingly and in line with previous research, spousal adjustment has a positive relationship with general adjustment \( r = .29 \).

Social networks and social support have been found to have similar importance for cross-cultural adjustment. In this study, a significant relationship was found between the degree of social network and general \( r = .27 \) as well as interaction adjustment \( r = .35 \) as can be seen in Table 4.28. It is suggested by research that the bigger and closer the social network of an expatriate is, the easier the ability to cross-cultural adjust (Wang & Kanungo, 2004). There is no research as to what type of adjustment social networks has the biggest influence. When including colleagues to social networks all three types of adjustment could reasonably be expected to be influenced by the size of the social network.
Table 4.28:

Correlation between adjustment and spousal adjustment and a good working social network

<table>
<thead>
<tr>
<th>Social network and cross-cultural adjustment</th>
<th>General adjustment</th>
<th>Working adjustment</th>
<th>Interaction adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spousal adjustment</td>
<td>0.29</td>
<td>0.11</td>
<td>0.18</td>
</tr>
<tr>
<td>Social network</td>
<td>0.27</td>
<td>0</td>
<td>0.35</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (Section 2, question 23 and 24 and F1, F2, F3)

4.8.5 Most important perceived factor for adjustment

The participants were asked to state which factor they feel is the most important factor influencing cross-cultural adjustment. The expatriates could choose between the following factors:

- Individual factors (e.g. personality, language skills, previous experience)
- Organisational factors (e.g. provided training, provided support)
- Job factors (e.g. job responsibility, differences in the new job)
- Non-work related factors (e.g. spousal adjustment, social support)

Most participants stated that individual factors are the most important determinant that influences cross-cultural adjustment (n = 81). Twelve expatriates stated that non-work related factors are the most influential, only six expatriates chose job factors and three organisational factors (see Chart 4.4).
It can be seen in Table 4.29 that expatriates who choose non-work related factors as the most important factor scored higher among all three adjustment types. However, this difference was not significant.

**Table 4.29**

<table>
<thead>
<tr>
<th>Perceived most important factor and adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>General adjustment</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Non - work related factors</td>
</tr>
<tr>
<td>Individual factors</td>
</tr>
<tr>
<td>Job factors</td>
</tr>
<tr>
<td>Organisational factors</td>
</tr>
</tbody>
</table>

**Source: Responses from questionnaire (Section 2, question 26)**

When comparing the means of all answers it reveals that most participants identify the ability to speak the host language as the most important factor for
cross-cultural adjustment, followed by the personality trait of openness and agreeableness as can be seen in Table 4.30.

Table 4.30

Perceived most important factor

<table>
<thead>
<tr>
<th>Perceived importance of…</th>
<th>Mean</th>
<th>SD</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language knowledge</td>
<td>4.58</td>
<td>0.78</td>
<td>5</td>
</tr>
<tr>
<td>Openness</td>
<td>4.33</td>
<td>0.87</td>
<td>5</td>
</tr>
<tr>
<td>Agreeableness</td>
<td>4.29</td>
<td>0.67</td>
<td>4</td>
</tr>
<tr>
<td>Emotional stability</td>
<td>4.25</td>
<td>0.91</td>
<td>5</td>
</tr>
<tr>
<td>Spousal adjustment</td>
<td>4.25</td>
<td>0.86</td>
<td>4.5</td>
</tr>
<tr>
<td>Social network</td>
<td>4.23</td>
<td>0.78</td>
<td>4</td>
</tr>
<tr>
<td>Organisational care of expatriates well - being</td>
<td>4.19</td>
<td>0.85</td>
<td>4</td>
</tr>
<tr>
<td>Organisational support</td>
<td>4.17</td>
<td>0.94</td>
<td>4</td>
</tr>
<tr>
<td>Organisation has support practices in place</td>
<td>4.15</td>
<td>0.88</td>
<td>4</td>
</tr>
<tr>
<td>Extroversion</td>
<td>4.05</td>
<td>0.87</td>
<td>4</td>
</tr>
<tr>
<td>previous overseas</td>
<td>4.05</td>
<td>0.98</td>
<td>4</td>
</tr>
<tr>
<td>Similar organisational culture</td>
<td>4.02</td>
<td>0.91</td>
<td>4</td>
</tr>
<tr>
<td>Problems with job factors</td>
<td>3.82</td>
<td>0.88</td>
<td>4</td>
</tr>
<tr>
<td>Conscientiousness</td>
<td>3.76</td>
<td>1.00</td>
<td>4</td>
</tr>
<tr>
<td>Cross-cultural training</td>
<td>3.74</td>
<td>1.03</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Responses from questionnaire (entire Section 2)

Although, there was no significant relationship between the perceived importance of factors and the actual adjustment, most of the factors that are perceived to be important had a significant relationship with adjustment in this study.

4.9 Concluding remarks

This chapter had the purpose to analyse and interpret the data obtained from the empirical study by the use of questionnaires. Empirical results found the basis to identify which factors (individual, organisational, job related and non-work related) have a correlation with any type of adjustment as well as to ascertain the perceived importance of those factors.

This was conducted against the backdrop of the theory by comparing the empirical results with the expected results based on the previous research.
The next chapter will draw conclusions from the empirical results, as well as make recommendations based on the findings of this chapter.
CHAPTER 5: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

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CHAPTER 5:
SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

The previous chapter discussed how the collected data was analysed in order to answer the research questions. This chapter provides the summary of the study, its limitations and problems, as well as practical recommendations and future research directions.

The parallel processes of internationalisation and globalisation have led to an increasing number of companies sending managers abroad. Companies send expatriates overseas in order to (Brewster et al., 2008, p.291):

- Enhance the control of the centre
- Underline the importance of the country to the local government
- Provide skills not existing in that geographical location
- Provide opportunities for management development
- Internationalise the managerial cadre

However, there is a high failure rate among expatriates. This study is based on the assumption that certain factors support cross-cultural adjustment. Therefore, the objectives of the study were to:

- Identify critical factors which abet or hinder cross-cultural adjustment
- Identify to what extent organisational factors influence cross-cultural adjustment
- Identify to what extent the individual factors abet or hinder cross-cultural adjustment
- Identify to what extent the job related factors abet or hinder cross-cultural adjustment
- Identify to what extent the non-work related factors abet or hinder cross-cultural adjustment
- Identify the perceived importance of the identified factors
Draw recommendations for individuals and companies pointing out the critical factors

The study was divided into the following five chapters:

Chapter 1 Introduction, problem statement, definition of key terms and the outline of the study

Chapter 2 Factors influencing expatriate’s ability to cross-culturally adjust

Chapter 3 Research design

Chapter 4 Analysis, interpretation and discussion of research results

Chapter 5: Summary, conclusions and recommendations

The study (empirical and literature part) has resulted in many interesting findings, which partly support already existing literature and point towards new perceptions of examined relationships.

5.2 Summary of the findings of the study

The study aimed to address the question:

**Which factors are critical for expatriates to succeed in their (foreign) assignments through cross-cultural adjustment?**

The research was encouraged by the fact that although there is a very high failure rate of international assignments all over the world, companies still send expatriates overseas. Moreover, extensive research has been conducted in this area and factors have been identified which support cross-cultural adjustment. Yet expatriates struggle to successfully complete their assignment and companies do not provide required support, especially in terms of cross-cultural training (Andreason, 2002; Beitler, 2005; Black & Gregersen, 1991; Kraimer, Wayne & Jaworski, 2001; Liu & Shaffer, 2005; The Japan Institute for Labour Policy and Training, 2002).
In order to resolve the main problem, sub-problems were derived and addressed in various chapters of this study. The sub-problems are listed below, in line with a brief discussion on each sub-problem.

A critical inspection of the main problem lead to the discovery of the following sub-problems:

**Sub-problem 1:** To what extent do personal factors affect the expatriates' success to fully cross-culturally adjust?

A literature study was conducted to identify the main personal factors influencing cross-cultural adjustment. The most common identified factors by researchers were the “Big Five” personality traits, host language skills, and previous overseas experience (Ramalu et al., 2010; Stroh & Caligiuri, 1998; Zuckerman, 2005).

Various researchers have emphasised the importance of the “Big Five” personality traits (extroversion, agreeableness, conscientiousness, emotional stability and openness) for successful cross-cultural adjustment (Buss, 1991, Goldberg, 1992; Huang, Chi & Lawler, 2005; Price & Novicevic, 2001; Ramalu et al., 2010; Stroh & Caligiuri, 1998; Zuckerman, 2005). However, there is no agreement among researchers which “Big Five” personality trait is most important for cross-cultural adjustment.

In the empirical part of this study expatriates were asked to indicate the perceived importance of the “Big Five” for cross-cultural adjustment. In this study the “Big Five” which had a positive correlation with any type of adjustment were extroversion, conscientiousness, agreeableness and openness.

The second individual factor identified to influence cross-cultural adjustment is language knowledge. A lack of language skills has been recognised to be the main problem in terms of cross-cultural adjustment (Andreason, 2008, p. 387). In this study expatriates perceived language skills as the most important individual factor for cross-cultural adjustment (Mean 4.58, SD: 0.78, Median: 5). Moreover, in this study a significant relationship was detected between the ability to speak the host language and all three facets of adjustment.
The last factor identified as a major individual factor for cross-cultural adjustment is previous overseas experience (Black et al., 1991; Church, 1982). In this study no relationship was found between previous overseas experience and any adjustment type.

**Sub-problem 2:** To what extent do organisational factors affect the expatriates' success to cross-culturally adjust?

Organisational factors include cross-cultural training, language training, logistical support, organisational culture, leadership style and organisational practices that support adjustment. Organisational factors have been found to be essential for cross-cultural adjustment (Caligiuri et al., 2001; Morley et al., 2004; Littrell et al., 2006).

The empirical part of this study revealed that expatriates perceive organisational support as essential for cross-cultural adjustment. However, this study revealed as well that most expatriates did not receive sufficient cross-cultural adjustment. 48 per cent of the sample did not even receive any organisationally provided cross-cultural training. Therefore, it is not surprising that no significant correlation was found between received cross-cultural adjustment and cross-cultural training.

However, the low level of cross-cultural training is in line with other research. A lot expatriates reporting that organisations do not provide enough cross-cultural training (Caligiuri et al., 2001).

**Sub-problem 3:** To what extent do job related variables influence the expatriates' success to cross-culturally adjust?

Research has identified job factors (role ambiguity, role discretion, role conflict, role novelty and role overload) to be essential for work adjustment (Hechanova-Alampay et al., 2001; Morely et al., 2004). The results conducted in the empirical part of this study were in line with this. A positive relationship was found between few problems in terms of job factors and work adjustment.

**Sub-problem 4:** To what extent do non-work related factors influence the expatriates' success to cross-culturally adjust?
The literature review revealed that certain factors not related to work have a significant influence on expatriate’s ability to cross-cultural adjust (Morley et al., 2004, p. 209). The most important ones are spousal and/or family adjustment and social networks (Haslberger, 2005).

In the literature review it was found that spouse adjustment is positively related to the general adjustment of the expatriates \( (r = .34) \) (Shaffer et al., 1999). Similar results were revealed by Black and Gregersen (1991) showing a positive correlation between spouse and general adjustment \( (r = .80) \). The empirical part of this study showed the same results. A positive relationship was found between spousal adjustment and general adjustment.

Moreover, several studies were able to show that the bigger and better working the social network of an expatriate is, the easier it is to cross-culturally adjust (Wang & Kanungo, 2004). In this study similar results were found. A positive relationship was revealed between social network and general as well as interaction adjustment.

**Sub-problem 5: What factors expatriates perceive to be the most important for cross-cultural adjustment?**

One objective of this study was to identify the factors are perceived to be most important for cross-cultural adjustment. This knowledge is expected to be important for organisations as well as expatriates for various reasons.

Firstly, the participants of this study have all been on a foreign assignment and they can draw from their experience which factor helped most to cope with the new cultural environment. Secondly, if organisations can ensure that expatriates are prepared in respect to factors expatriates perceive to be important it can reduce stress, which helps to adjust to the new culture.

In this study it was revealed that most of the factors expected to be important for cross-cultural adjustment, did have a positive relationship with cross-cultural adjustment.
5.3 Problems and limitations

No major problems were encountered in conducting the research study except those problems usually associated with the survey method of data collections. However, possible sources of errors have been discussed in the third chapter (see 3.7). Therefore, only the problems and limitations that occur during this study will be discussed below.

The main problems associated with surveys are non-returns (non-response bias), misinterpretation, and validity problems as well as limitations and problems related to the size and representativeness of the sample (Babbie, 2010; Silverman, 2006; Trochim, 2006).

Misinterpretation is a typical survey problem. The participants might not understand the question or statement. Since questionnaires are standardised it is not possible to explain anything in the questions that participants might misinterpret (Babbie, 2010, p. 272). However, this problem was minimised by a cover letter and a pilot-study.

Validity problems occur as when using a questionnaire the researcher is unable to check on the validity of the respondents’ answers (Silverman, 2006). In this study the respondents could have provided false information for better self perception or respondents could have responded in the way that they assumed the researcher might want them to respond. Hence, participants could have pretended to be better cross-cultural adjusted than it was the actual case. Another validity problem could be based on the non response bias. It might be possible that low adjusted expatriates were not willing to participate in the study or on the other hand in terms of the response bias that expatriates who were very well adjusted were more willing to fill in the questionnaire.

Lastly, as Babbie (2010, p. 272) states it is difficult to assure that respondents of an online survey are representative of the more general population. In this study the sample size was only 102 and consists mainly of German expatriates, therefore it is arguably how representative the results are.
Another limitation of this study might be that it did not consider the influence culture novelty has on the expatriates’ ability to cross-cultural adjust.

5.4 Recommendations

Based on the literature review and the empirical part of the study the researcher gives the following practical recommendations.

- Expatriates should be able to communicate in the host language. Therefore, organisations should provide cross-cultural training with special emphasis on language training. The family of the expatriate should be included in the cross-cultural training in order to increase spousal/family adjustment. Moreover, organisations should put emphasis on the “Big Five” personality traits during the selection process. The gender of the chosen expatriates should not be a factor of consideration.
- Moreover, organisations should provide contact to people already living in the host country in order to help expatriates to build a social network in the new environment.
- Lastly, the provided cross-cultural training should consider the cultural differences between home and host country, the length of the assignment and the new job responsibilities of the expatriates.

Recommendations for future research into factors influencing cross-cultural adjustment were also identified in this study.

- Firstly, in order to evaluate the relationship between spousal adjustment and the expatriates’ ability to cross-cultural adjustment it is recommended to measure the spousal adjustment directly and not based on the evaluation of the partners.
- Secondly, it would be interesting to include the manager of the expatriates into future research in order to detect whether there is a relationship between the degree of cross-cultural adjustment and the success of the assignment.
- One more recommendation for future research is to identify factors influencing cross-cultural adjustment for self-initiated expatriates and
which factors those perceive to be important. This could for example offer valuable insight to governments or organisations to attract foreign skilled labour for example.

Lastly, organisational support and new job factors can vary in a large extent in their perception based on the personal traits of the expatriates. Therefore, it is recommended for future research to analyse the practise offered by organisations to support cross-cultural adjustment in relation to the degree of cross-cultural adjustment.

5.5 Concluding remarks

This research study aimed to identify the factors that influence cross-cultural adjustment.

The literature review revealed a division of the factors influencing cross-cultural adjustment into four categories:

- Individual factors ("Big Five" personality traits, language knowledge, previous overseas experience)
- Organisational factors (cross-cultural training, POS, direct organisational support, logistic support etc.)
- Job factors (role novelty, role clarity, role discretion, role conflict, role overload)
- Non-work related factors (spousal adjustment, networks)

In this empirical part of this study showed that individual factors have a positive relationship with adjustment. The strongest one was found between host language knowledge and adjustment (general adjustment $r = .31$; working adjustment $r = .31$ and interaction adjustment $= .45$). The most important factor after language for cross-cultural adjustment in the study at hand was spousal adjustment ($r = .35$) and a good social network ($r = .29$).

One aim of this study was to identify the perceived importance of factors for cross-cultural adjustment. The most important factors identifies by expatriates were language knowledge, "Big Five", spousal adjustment and social network. All these factors all showed a positive relationship to one or more adjustment types.
Hence, it can be concluded that factors that are perceived to be important do actually influence the ability to positively cross-cultural adjust.
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The Economist. (21 July 2005). *Women in business. The conundrum of the glass ceiling. Why are women so persistently absent from top corporate jobs?*


Factors influencing cross-cultural adjustment

Section 1

Cross-cultural adjustment

It is completely normal for an individual to have difficulty adjusting to living or working in a foreign country. Please indicate the degree to which you have adjusted or not adjusted to the following items living in a foreign country. Please indicate the degree of your adjustment to the following factors.

How adjusted are you to the food in the foreign country?

*Please indicate the extent to which you are cross-cultural adjusted to the factor*

1 2 3 4 5

not adjusted ☐ ☐ ☐ ☐ ☐ completely adjusted

How adjusted are you to the health care facilities in the foreign country?

*Please indicate the extent to which you are cross-cultural adjusted to the factor*

1 2 3 4 5

not adjusted ☐ ☐ ☐ ☐ ☐ completely adjusted

How adjusted are you to the entertainment/recreation facilities and opportunities in the foreign country?

*Please indicate the extent to which you are cross-cultural adjusted to the factor*

1 2 3 4 5

not adjusted ☐ ☐ ☐ ☐ ☐ completely adjusted

How adjusted are you to the living conditions in general in the foreign country?

*Please indicate the extent to which you are cross-cultural adjusted to the factor*

1 2 3 4 5

not adjusted ☐ ☐ ☐ ☐ ☐ completely adjusted

How adjusted are you to the cost of living in the foreign country?

*Please indicate the extent to which you are cross-cultural adjusted to the factor*

1 2 3 4 5

not adjusted ☐ ☐ ☐ ☐ ☐ completely adjusted
How adjusted are you to shopping in the foreign country? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to housing conditions in the foreign country? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to performance standards and expectations in the foreign country? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to supervisory responsibilities in the foreign country? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to specific job responsibilities in the foreign country? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to interacting with host nationals outside of work? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted

How adjusted are you to interacting with host nationals on a day-to-day basis? 
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

not adjusted [ ] [ ] [ ] [ ] [ ] completely adjusted
How adjusted are you in respect to speaking with host nationals?  
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>not adjusted</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

How adjusted are you in respect to socializing with host nationals?  
*Please indicate the extent to which you are cross-cultural adjusted to the factor*

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>not adjusted</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 2

Perceived importance of factors influencing cross-cultural adjustment

This part deals with the factors influencing adjustment. It requires you to indicate your opinion to different statements (from strongly agree to strongly disagree). Furthermore, some of the questions in this part ask you to indicate your personal experience in regard to the factors.

Enjoying human interactions and being enthusiastic, talkative, assertive, and gregarious supports cross-cultural adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

The tendency to be pleasant and accommodating in social situations and having an optimistic view of human nature supports cross-cultural adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

The tendency to show self-discipline, act dutifully, and aim for achievement supports cross-cultural adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree
Being emotionally stable, less reactive to stress and tending to being calm are characteristics that support cross-cultural adjustment.

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree 1 2 3 4 5 strongly agree

The willingness to accept new and unconventional ways of thinking and behaving supports cross-cultural adjustment.

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree 1 2 3 4 5 strongly agree

The ability to communicate in the host-country language is important for cross-cultural adjustment.

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree 1 2 3 4 5 strongly agree
Please indicate your level of communication skills in your current / last host – country language

1 = basic knowledge, 2 = conversant, 3 = proficient, 4 = fluent, 5 = bilingual or native language

1 2 3 4 5

basic knowledge ☐ ☐ ☐ ☐ ☐ Native language

My company offered me host - language training

Please indicate the extent to which you agree or disagree

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

Expatriates with previous overseas experience are more likely to fulfil their assignment successfully

Please indicate the extent to which you agree or disagree

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

I have had overseas experience before I went on this (or the last) foreign assignment

Please chose one of the following options

- ☐ No
- ☐ Yes, once or twice
- ☐ Yes, three or four times
- ☐ Yes, five or more times
Pre-departure cross-cultural training provided by the home company is essential for cross-cultural adjustment.

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐  strongly agree

Please indicate the amount of cross-cultural training you received:

- ☐ None
- ☐ Between 1 and 2 days
- ☐ Between 3 and 5 days
- ☐ Between 6 and 7 days
- ☐ More, than one week

If the parent organisation has practices in place that support expatriates it will ease the expatriates’ adjustment (e.g. training, logistical support, family support).

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐  strongly agree

If the parent company is interested in the well-being of the expatriate, cross-cultural adjustment is easier.

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐  strongly agree
My parent company takes care of me while I am on the foreign assignment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

If the host company offers support through training, logistical support and family support it eases cross cultural adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

My host company offered such support (as described above)

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

If the host and parent company have a similar organisational culture adjustment is easier

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree
My host and parent company have a similar organisational culture

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

If the old job is similar to the new job, the expatriate has a high amount of leeway in performing his or her job, the job responsibility is clear and the expatriate does not receive incompatible and/or conflicting information about what is expected of individuals in a new work setting and there are no excessive demands placed upon the expatriate in the new position, adjustment should be easier

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

In my case there were no problems with job factors (as described above)

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

Spousal (or partner) adjustment is essential for expatriate's adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree
My spouse is well adjusted

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

Strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

Social support is essential for cross-cultural adjustment

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

Strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

I have a well working network and receive a high amount of social support in the foreign country

*Please indicate the extent to which you agree or disagree*

1 2 3 4 5

Strongly disagree ☐ ☐ ☐ ☐ ☐ strongly agree

Please indicate which of the following factors is in your opinion the most important factor for cross-cultural adjustment

*Please tick the factor you consider as the most important one*

- ☐ Individual factors (e.g. personality, language skills, previous experience)
- ☐ Organisational factors (e.g. provided training, provided support)
- ☐ Job factors (e.g. job responsibility, differences in the new job)
- ☐ Non-work related factors (e.g. spousal adjustment, social support)
Section 3

Biographical information

In the last part you are asked to state your biographical details, such as age and gender for the purpose of statistical analysis. If you want to be part of the raffle please add your email address at the end. When participating in the raffle you have the chance to win a voucher worth 30 USD for an online shopping portal (e.g. Amazon or Kalahari depending on your country). Your email address will only be used for the raffle and will be captured separately from your answers. The questionnaire itself is completely anonymous.

Your country of origin

Your host country

Marital status

- Single
- Married
- Living a relationship
- Divorced
- Widowed

Number of children with you on the assignment

- 0
- 1
- 2
- 3
- 4 or more
Your age? [ ]

Gender?

- [ ] Female
- [ ] Male

If you want to participate in the raffle please add your email address [ ]
Factors influencing cross – cultural adjustment

Dear participant,

The purpose of this research study is to identify the importance of various factors influencing cross – cultural adjustment. This study is done in order to help expatriates to cross – cultural adjust, as well as to help companies to help expatriates to adjust.

This questionnaire consists of three parts. The first part deals with your degree of cross – cultural adjustment. Here, you are asked to indicate how well you are adjusted to several factors.

The second part deals with the factors influencing adjustment. It requires you to indicate your opinion to different statements (from strongly agree to strongly disagree). Some of the questions in this part ask you to indicate your personal experience in regard to the factors. In the last part you are asked to state your biographical details, such as age and gender for the purpose of statistical analysis.

If you want to be part of the raffle please add your email address at the end.

When participating in the raffle you have the chance win a voucher worth 30 US Dollars of an online shopping portal (e.g. Amazon or Kalahari depending on your country).

Your email address will only be used for the raffle and will be capture separately from your answers. The questionnaire itself is completely anonymously.

Although the results of this study may be published, no information that could identify the participants will be included.

If you have any questions, concerns, or complaints or if you feel you have been harmed by this research please contact Anjuli Hesse.

It should take 15 minutes to complete the questionnaire. Participation in this study is voluntary. You can choose not to take part and you can also choose not to finish the questionnaire or omit any question you prefer not to answer without penalty or loss of benefits.
By returning this questionnaire, you are giving your consent to participate.

Your participation will be greatly appreciated.

Anjuli Hesse
Email: Juli-hesse@gmx.de
Cell: (0027) 784160522
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