A STUDY TO EXAMINE THE PREPARATION

AND TRAINING OF HOSPITALITY

EXPATRIATE EXECUTIVES

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DEDICATION

For my darling Raybots,

the best thing that ever happened to me…

For Papa Bebie and Mama Dading,

our manna from heaven…

a wonderful golden wedding anniversary!

ACKNOWLEDGMENTS

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CHAPTER I

INTRODUCTION

A competent expatriate hotel manager is critical to any hospitality firm's success (Gorchels, Jambulingan, & Aurand, 1999). Expatriates often have detailed knowledge of the managerial systems used by a company and have an important part to play in the solidity of an organization's corporate culture in distant locations (Barber & Pittaway, 2000).

A major driving force behind the expansion and utilization of expatriates is the growing demand for labor in the international hospitality industry combined with a major labor shortage in some Asian countries (Barber & Pittaway, 2000; Burns, 1997). The predicted employment requirements of the international hospitality industry are quite staggering and are forecasted to rise from 255 million in 1996 to 385 million by 2006 (The Economist, 1997; Barber & Pittaway, 2000). Expatriates were required to support this growth at many operational and managerial levels. The management of expatriate labor in the future became more important to hotel companies and would cover many aspects of hotel labor as well as managerial and professional positions (Barber & Pittaway, 2000).

Why use expatriates instead of host-country managers and/or domestically-based international managers? According to Barber and Pittaway (2000), expatriates running

foreign operations are more likely to be familiar with the corporate culture and control systems of headquarters than are host-country managers, which results in more effective communication and coordination with the corporation. However, several authors (Kriegl, 2000; Gorchels, Jambulingan, & Aurand, 1999; Cebrowski, 1998) suggest that being respected and connected in the host country is a critical determinant of a high-performance global executive. Second, expatriates provide managerial talent in developing countries where there is limited local talent. Third, the use of expatriates enhances the global mind-set of the organization. Expatriates are also a better option than domestic international managers when short-term international visits are insufficient for successfully growing a business in the target country.

However, there is also a downside to using expatriates. Expatriate failure may be measured by the rate at which expatriates return prematurely from foreign assignments. A recent survey by Employee Benefit Plan Review (2001) suggests that 20% of expatriates return home early. In comparison, Birdseye and Hill (1995) estimated early return rates of American expatriates at 16 – 40%, while Shay and Tracey (1997) estimate a 70% return rate for expatriates sent to undeveloped countries. Expatriate failure rates have been estimated at 16-40% (Shaffer, Harrison, & Gilley, 1999), 20-40% (Solomon, 1996), and 30-50% (Black, Mendenhall, & Oddou, 1991).

The average estimated monetary cost of an expatriate failure is placed at anywhere from $200,000 to $1.2 million (Solomon, 1996; Swaak, 1995). In addition to monetary costs, failed expatriate efforts can also lead to negative organizational outcomes such as delayed productivity, poor relationships with local nationals, negative

perceptions of the company, difficulty for expatriate successors, and ineffective repatriation (Graf & Harland, 2005; Bennett, Aston & Colquhoun, 2000).

Failed expatriate assignments can result in direct financial loss to a firm ranging from approximately UK £175,000 to UK £350,000 depending upon the country or region of the world, damaged relationships with the host country, lost business opportunities, as well as damaged career paths for individuals who probably should not have been sent overseas (Mervosh & McClenahen, 1997; McGrath-Champ & Yang, 2002).

Estimates of the number of international assignments ending in failure or premature return range widely from 8% (McGrath-Champ & Yang, 2002; Daniels & Insch, 1998) to as high as 50% (McGrath-Champ & Yang, 2002; Bird & Dunbar, 1991). An even larger number of expatriates suffer through their assignments with burnout, low motivation, inadequate skills, frustration, and are believed to have a negative impact on the organization that could equal or far exceed a failed expatriate's consequences (Bennett, Aston & Colquhoun, 2000).

Lack of cultural preparedness and training was considered to be the major cause of expatriate failures, yet very few companies have adequate processes for selecting and training expatriate managers (Tung, 1981 & 1987; Porter & Tansky, 1999; McGrath-Champ & Yang, 2002). Most studies on managing executives have been conducted across a variety of industries. However, researchers failed to consider the specific requirements of the hospitality industry (Kriegl, 2000).

Statement of the Problem

The number of international assignments of hospitality expatriate executives ending in failure has increased.

Research Purpose

The purpose of this study was to establish a model to prepare the expatriate executives for their assignment to their host countries to minimize expatriate failure. Specifically the study would:

1) Establish a model for a successful hospitality expatriate executives' overseas assignment.

2) Determine the important management skills of successful expatriate executives.

3) Determine cross-cultural training activities that are provided for hospitality expatriate executives.

4) Determine whether the expatriate executives' management skills vary by country of origin.

5) Examine whether the expatriate executives' management skills vary according to the location of parent company.

Research Questions

1) What are the components of a model for a successful hospitality expatriate executives' overseas assignment?

2) What are the most important management skills international hospitality executives should possess?

3) What cross-cultural training activities that the parent company provided were most effective for the success of an expatriate assignment?

4) Do the required skills vary by the respondents' country of origin?

5) Do the management skills vary according to the location of the parent company?

Definition of Terms

An expatriate is defined as an employee who has spent at least once of his/her career working on temporary, short-term, long-term and/or semi-permanent assignments in overseas locations (Adapted from Heizman et al., 1990; quoted in Gliatis, 1992). In addition, an expatriate is a person who was not born in the country the hotel is located; does not hold the nationality of the country the hotel is located and who is hired on the expatriate status (Li, 1995). For this particular study expatriate referred to the executives, managers or the heads of various departments within a hotel facility located outside of his/her native country.

Significance of the Study

(1) This research would contribute to the knowledge on hospitality international management by determining the skills necessary for a successful hotel expatriate manager.

(2) Enhances a global hospitality organization's effort to distinguish and develop international hospitality executives by designing an effective cross-cultural training program.

(3) Because of the importance of adaptability to foreign cultures, extended training in business protocol and social and cultural practices is a necessity for developing hospitality expatriate executives.

(4) This may contribute to hospitality education by creating a course on globalization particularly international hospitality management.

(5) Help to jump start the beginning of a book on international hospitality management.

Assumptions

This study had the following assumptions:

1. The sample was drawn from the global hospitality companies' directory. The findings cannot be generalized beyond that target population.

2. This is a self-report study in which honesty in responses is not guaranteed.

3. The return may be lower due to non-response and undeliverable emails since the study utilized a Web-based or online survey.

CHAPTER II

REVIEW OF LITERATURE

Introduction

This generation had entered the Global Age. More and more people are global, they shared many global values and practices, and a huge number of individuals worked for global organizations. Globalization caused a converging of economic and social forces, of interests and commitments, of values and tastes, of challenges and opportunities. One can easily communicate with people 10,000 miles away because of a shared global language (English) and a global medium for communications such as computers and the Internet (Black, Gregersen, Mendehall, & Stroh, 1999).

Four main forces have quickly brought about this global age: technology, travel, trade, and television. These four T's have laid the groundwork for a more collective experience for people everywhere. An increasing number of people share common tastes in foods (hamburgers, pizza, tacos), fashion (denim jeans), and fun (Disney, rock music, television). Nearly 2 billion passengers fly the world's airways each year. People watched the same movies, read the same magazines, and danced the same dances from Boston to Bangkok to Buenos Aires (Mendenhall, 2000).

Ever more people speak English – now spoken by more than 1.5 billion people in over 130 countries (often as a second, third, or fourth language). The English language, like all languages, carries with it implicit and explicit cultural and social values (e.g., precision, individualism, active control, clarity). It became the global language of the airlines, the media, computers, business, and the global marketplace (Marquardt, 1999).

The global marketplace created the need for global corporations. These organizations, in turn, created an even more-global marketplace. The growing similarity of what customers wished to purchase, including quality and value, spurred both tremendous opportunities and incredible pressures for businesses becoming global. To a great extent companies, regardless of size or age, recognized that the only choice was between becoming global or becoming extinct (Schwandt & Marquardt, 2000; Marquardt, 1999).

Global organizations were companies that function as if the entire world were a single entity. They were fully integrated so that all of their activities link, leverage, and compete on a worldwide scale (Marquardt & Snyder, 1997). Global firms emphasized global operations over national or multinational operations. They used global sourcing of human resources, capital, technology, facilities, resources, and raw materials. They believed cultural sensitivity to employees and customers were critical to the success of the organization (Adler, 1991).

The global economy created a level of complexity that most organizations were not prepared to understand, let alone deal with. Organizations must relate to

the ever-growing complexity of multiple relations in their environments – foreign markets, partnerships, and growing and failing economies, to mention a few (Schwandt & Marquardt, 2000).

Theoretical Background

Globalization

Globalization is the process by which the world is becoming more and more interconnected, with existing political, cultural, and economic boundaries being superseded. Many discussions of post-modernity of cultural theory involved some discussion of globalization. A major reason for this was the social forces associated with the postmodernization of culture (e.g. the media, consumerism, tourism, the transnational corporation) also played a core role in generating a world that is growingly interconnected. Globalization can be thought of as a process involving three key dimensions (Silverthorne, 2005). These were as follows:

- Economic globalization is associated with the rise of world finance markets and free-trade zones, the global exchange of goods and services, and the rapid growth of transnational corporations.

- Political globalization is about the way that the nation-state is being superseded by international organizations (e.g. the United Nations, the European Union) and the rise of global politics.

- Cultural globalization is about the flow of information, signs, and symbols around the world and reactions to that flow.

While discussion of globalization took off in social science during the 1980s, it is important to remember that the process has been going on for millennia. The movement from small-scale hunting and gathering societies toward the modernist nation state, for example, can be seen as a step toward a global society. For this reason much orthodox social and cultural theory can be understood as relating to the issue. The theories of Durkheim, Marx and Weber (year) provided diverse accounts of ways that forms of social organization extending over ever larger regions of time and space followed one another during the broader span of history. Notwithstanding the fact that people can reconstruct past theoretical traditions in this way, most attention in research on globalization is focused on contemporary settings. In the field of cultural globalization, in particular, themes relating to capitalism, commodities, time/space distanciation, and information flows lead to an inevitable convergence between globalization, postmodernization, and postmodernism literatures (Smith, 2001).

The best-known theory in this tradition was George Ritzer's (1996) concept of McDonaldization, which draws on the work of Marx and Weber. The idea here was that the principles of fastfood organizations were engulfing to a greater extent sectors of society and areas of the world (Smith, 2001). These principles can be summed up as efficiency, calculability, predictability, and control.

A model emerged which stressed the incredibly complex interplay of the global and the local. Global refers to the spatially extensive social and cultural forces associated with globalization (e.g. consumerism, satellite communications, culture

industries, migration), while local refers to small-scale, geographically confined traditions and ways of life (e.g. ethnic traditions, language, religion). This pointed to the way that processes of globalization have seen global and local cultures brought into contact with each other. These collisions have brought about hybridization. Hybridization can arise from the mixing of cultures and lifestyles. A major theme here can be the way that global forces and products and adapted or modified by local conditions (Smith, 2001).

Globalization in Business

It has been argued by many scholars and business observers that people – not plans, systems, or strategies – were the key to obtaining a global competitive advantage for a company in any given industry (Mendenhall, 2001). What skill sets or competencies make up the repertoire of an expatriate executive? The following list were the determinants of expatriate adjustment from the research literature: self-efficacy, resilience, behavioral flexibility, curiosity, extroversion, broad category width, flexible attributes, open-mindedness, high tolerance for ambiguity, empathy/respect for others, non-verbal communication, relationship skills, willingness to communication, spouse adjustment, family adjustment, social/logistical support, culture novelty, organization culture novelty, role conflict, role novelty, role discretion, goal orientation, technical competence, reinforcement substitution, and stress reduction program (Mendenhall, 2001).

These skill sets or competencies influenced expatriate adjustment which correlated to success in international assignments. The field of expatriate adjustment was well developed and the majority of scholars in this field would agree that each of the variables listed has been empirically or theoretically demonstrated to positively influence expatriate adjustment (Mendenhall, 2001; Black et al., 1999; Stahl, 1998b).

National Culture

Theories provided tools for understanding the make-up of culture. As seen, divergent traditions have understood culture as values, codes, narratives, pathologies, discourses, and common sense as well as in many other ways. Each of these understandings has its own repercussions for interpreting the ways that culture works and how everyone should study it (Silverthorne, 2005).

Here theory is concerned with offering models of the influence that culture exerts on social structure and social life. Theorists attempt to explain the role of culture in providing stability, solidarity, and opportunity or in sustaining conflict, power, and inequality. Cultural theory also suggests divergent mechanisms through which this influence is channeled, ranging from individual-level socialization through to macro-level institutions and social systems (Smith, 2001). The most critical issue concerns the ways in which culture shapes human action. Some thinkers stress the constraining nature of culture, while others point to its ability to

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enable action. Issues relating to the cultural construction of the self, motivation, and identity are fundamental to both sets of arguments (Smith, 2001).

The careless application of theories of organizational psychology across cultures is fraught with danger because research has found that, while there are similarities, the differences between organizations operating in distinct cultural and societal settings are significant (Silverthorne, 2005). The similarities tend to be consistent for the same types of business and organizational structure, though there can be considerable variance between organizations operating as similar organizational types but in different societies in such areas as employee-management relations, communication within organization, and staff involvement in decision making (Silverthorne, 2005; Maurice, Sorge & Warner, 1980).

Even though the role of a manager is generally consistent across organizations and cultures, managerial styles can vary substantially. While the evidence available from research on managerial styles in different cultures is limited, distinct social systems can have a considerable impact on management systems, which, in turn, affects managerial styles. Further, research in international settings has clearly shown that management techniques developed in and for a particular culture or country do not always produce the same results in other cultures (Silverthorne, 2005; Adler, 1997).

The effectiveness of a manager is, in part, based on the values that the manager holds and his or her ability to motivate employees. Values are influenced by both the nationality of the manager and the business environment within which

the individual manages (Silverthorne, 2005; Adler & Bartholomew, 1992). These values guide the selection and evaluation of managerial behaviors such as techniques for motivating subordinates (Terpstra & David, 1990) and enhancing employee job satisfaction (Trice & Beyer, 1993). Style of organizational leadership has also been shown to be a relevant variable in the implementation of management practices (Atwater & Wright, 1996). The norms established by the leader and by the organizational culture allow employees to make sense of their organizational world; if that world makes sense to them, they are likely to be more productive and more satisfied with their jobs.

Organizations in Western cultures have embraced the idea of organizational-development interventions designed to enhance organizational effectiveness at the individual and organizational levels. However, organizational-development interventions can be influenced by culture, resulting in reduced, negative, or nonexistent change outcomes. This suggests that in multinational companies some adaptation of organizational-development interventions is necessary. The primary and recurring issue is whether a subsidiary is influenced more by the parent-company culture or the local culture. A comparison of American, Japanese, European, and Hongkong Chinese multinational companies indicated that organizational-development interventions differ by country, primarily as a function of the organization's home-country culture. American and European organizations are most likely to use both at home and in subsidiaries, organizational-development interventions than Asian companies. Chinese firms have been found to be less open

to individual-level interventions and more open to system-level changes, given their long-term orientation. Evidence indicated that organizational-development interventions that take place at a system level can be used independently of culture, while individual-level interventions are more affected by cultural differences and are, therefore, more likely to need to be adapted to local-culture needs (Silverthorne, 2005; Lau & Ngo, 2001).

Anyone who has visited other countries knew that differences existed in language, mannerisms, dress, and customs. But in addition, there are hidden differences that are less obvious. Being able to speak the language can help highlight these differences, but Americans are often at a disadvantage in this regard, since being fluent in another language is the exception rather than the rule for most nonimmigrants in the United States. However, culture and the perception of cultural differences are hard to define and explain, and it must be remembered that while culture suggests similarities and uniformity within a society, there is also a wide range of individual differences (Silverthorne, 2005).

Hofstede's Classification of Culture

One of the most significant studies to look at the role of cultures within a single organization operating across many parts of the world was conducted by the Dutch researcher Geert Hofstede (1984). His research played a significant role in generating interest and additional research in multicultural settings, and it is

important to discuss the influence of his studies and theoretical framework on cross-cultural research and controversy it has generated (Smith, 2001).

Specifically, Hofstede (1984) looked at the work-related attitudes and values of comparable groups of managers working in a multinational company that operated in forty countries. The research began in 1967 and continued between 1971 and 1973, when surveys completed by over one hundred thousand IBM employees in different countries were tabulated and analyzed. To help in maintaining the comparability of the groups, only employees from the marketing and servicing divisions of the company were included in the sample. The data were collected using questionnaires, and the answers from those surveyed were averaged for each country. Then scores were developed for each country and these scores were analyzed using a factor-analysis technique designed to isolate the key factors that account for the majority of the variation in the employees' responses. Based on this analysis, Hofstede (1984) theorized that cultural differences could be usefully described by using four bipolar dimensions: power distance, individualism-collectivism, masculinity-femininity, and uncertainty-avoidance (Silverthorne, 2005; Hofstede, 1984).

Power Distance

The bipolar ends of this dimension are high and low, and it measures the level of inequality between people that is considered normal in the culture. The concept of power distance implies that in a hierarchical organization, people in

power will try to maintain their power, keeping power distance high. The level of

power distance helps to define who has the power in the organization to make

decisions in general and specific types of decisions in particular, as well as to help

prescribe rules and procedures within the organization. In high-power-distance

cultures, such as Malaysia, subordinates accept their status and respect formal

hierarchical authority. Cultures low in power distance, such as Israel, will have the

organizations in which managers are willing to share authority (Silverthorne, 2005;

Hofstede, 1984).

Individualism-Collectivism

This dimension is the degree to which people prefer to work as individuals

rather than as group members. Cultures high in individualism, such as the United

States, respects and values personal achievement, autonomy, and innovation.

Concern is for oneself as an individual rather than the group to which one belongs,

and people tend to classify one another on the basis of individual characteristics

rather than group membership. On the other hand, cultures high in collectivism,

such as Taiwan, emphasize group harmony, social order, loyalty, and personal

relationships. Individual contributions are not valued if they work against group

goals or interests. In order to maintain harmony in a collectivist culture, it is often

necessary to be conservative and cautious. The majority of countries are collectivist,

where group membership dictates a person's loyalty and identification and the

interests of the group take precedence over the interests of the individual

(Silverthorne, 2005; Hofstede, 1984).

Masculinity-Femininity

This dimension is the degree to which perceived typical masculine attributes

(e.g. assertiveness, success, and competition) prevail over perceived typically

feminine attributes (e.g. sensitivity and concern for others). Cultures high in

masculinity, such as Japan, are more likely to be male dominated, especially in

management, whereas cultures high in femininity, such as Sweden, are more likely

to have women in managerial and professional positions. In addition, masculine

societies are more likely to define occupations by gender, whereas in feminine

cultures women and men can do any job and are not restricted by gender-role

stereotypes (Silverthorne, 2005; Hofstede, 1984).

Uncertainty-Avoidance

The bipolar ends of this dimension are high and low, and it measures the

degree to which individuals prefer structure to a lack of structure. The concept of

uncertainty avoidance suggests that countries high in this dimension have high stress

levels and design rules and norms to reduce uncertainty or ambiguity to the greatest

extent possible. Cultures high in uncertainty avoidance tend to be uncomfortable or

insecure with risks, disorganization, and unstructured situations and will try to

control their environments by creating laws, rules, and institutions. This is

manifested in lifetime-employment practices in countries such as Japan and Greece. Cultures low in uncertainty-avoidance are more likely to accept differences in society, and people in these cultures are more curious about discovering and trying new things. The result is more job mobility, as seen in countries such as the United States and Denmark. Uncertainty can be due to human behavior or the nature of the environment, and it shapes the organizational mechanisms that are used to control and coordinate activities (Silverthorne, 2005; Hofstede, 1984).

What is Expatriation?

For most of business history the term international sufficed; its meaning was clear – outside the home country of the organization. An international executive, for the most part, was an expatriate, someone who lived and worked overseas. According to McCall & Hollenbeck (2002), the responsibilities of those early expatriates were not too different from how companies use expatriates today. They were charged with control, making sure that the provinces operated according to Roman law and sent in their taxes. These early expats were also responsible for knowledge transfer, bringing the province new administrative and technical skills, and in those days, perhaps, new gods, language and culture. Accomplishing those duties required that some knowledgeable and trustworthy executive go there to live and work in another country – building a set of skills, accumulating wealth, getting one's ticket punched for a promotion, escaping a bad situation, or perhaps just for the adventure itself (McCall & Hollenbeck, 2002). As communication and

transportation evolved and became global, traveling between continents became a convenience. The apparent ease of travel between countries enabled these executives to fly out from headquarters and manage overseas operations on short-term or long term basis (Schwandt & Marquardt, 2000).

Since then, the word global has been used interchangeably with transnational in describing an organization characterized by working across borders. As with crossing borders became easier and faster, organizations had increasingly followed their markets outside of their borders. What forms these organizations have taken and what types of executives they needed have depended, ideally at least, on what tasks had to be performed across borders (McCall & Hollenbeck, 2002).

The Expatriate Executive

Expatriates are defined as the non-citizens of the countries where they work (Daniels and Radebaugh, 1993). Frith (1981) defined an expatriate as one who works for a company in an overseas location for a contracted period of time, usually an excess of one year (Li, 1995). Simply put, expatriate executives are those who do global work. With so many kinds of global work, again depending on the mix of business and cultural crossings involved, there is clearly no one type of global executive. Executives, as well as positions, are more or less global depending upon the roles they play, their responsibilities, what they must get done, and the extent to which they cross borders (Schwandt & Marquardt, 2000).

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The terms international executives and global executives have been used interchangeably here. Both terms, as descriptors of both executives and jobs, involve "more or less" rather than absolutes (McCall & Hollenbeck, 2002). All global executives must have the ability to create trusting relationships across boundaries, to do so quickly, and to maintain them (Dotlich & Noel, 1998). Therefore, an expatriate is any individual who works outside their country of birth but does not immigrate to the country where they work. This included staff employed across all aspects of a hotel's operation and all work roles (Barber & Pittaway, 2000).

Assumptions on Expatriation

From many executives' view, if an international assignment can assist in the development of global executives, the resultant approach should be to simply send fast-trackers to other countries for a while so that they can become internationalized. Such fast-trackers are usually sent overseas with little or no training for their new assignments. They are expected to sink or swim cross culturally (Mendenhall, et al., 2001; Black et al., 1999; Mendenhall & Oddou, 1985).

The sink-or-swim approach makes sense to the minds of executives, it makes perfect sense to take someone who has performed well in one place and sent them to a foreign location in order to gain international skills and at the same time perform well at the subsidiary. The assumption was, since the best and the brightest people were being sent overseas, they should be able to figure out for themselves what should be needed in order to be successful (Mendenhall et al., 2001).

Importance of Expatriate Management in Business

As the world economy became more globalized, the labor forces worldwide became more mobile. To develop a management cadre with a global perspective and a familiarity with the company's interests in overseas operation (Li, 1995; Deresky, 1994), multinational firms are using expatriate managers to fill overseas managerial positions.

As the need of international management grows, the use of expatriates to run foreign operations is increasing as well (Scullion, 1991). Daniels and Radebaugh (1994) summarized the three major reasons for using expatriates: 1) technical competence; 2) management development; and 3) control. The need for technical competence is reflected in the tendency for companies to use expatriates in countries where management talents are not available.

The second reason for using expatriates is for the purpose of management development. Expatriation is part of the career development process since multinational experience can reinforce the international perspectives of upward moving managers. It can also enhance manager's ability to work in a variety of social systems and is therefore considered valuable training for ultimate corporate responsibility (Schwandt & Marquardt, 2000).

The third reason for using expatriate executives is to have close control of foreign operations. Expatriates are considered to be more familiar with the corporate culture of a company, which results in more effective communications and

coordination. Therefore, as companies are developing international expansion strategies, the need to use more expatriates for control purposes grows (Daniel & Radebaugh, 1994).

Despite the important role that the expatriate managers can play, many executives have not realized their potential contributions and have a narrow and myopic view of how they can be used and who should be involved with them (Black, Gregersen & Mendehall, 1992). Historically, firms have sent managers and professionals overseas to fill positions on a seemingly ad hoc basis; they have paid little attention either to their selection and training or to the role they could play in the overall organization (Boyacigiller, 1990). This approach created inherent problems. Individuals sent overseas without adequate training often failed, which incurs substantial costs to these companies (Li, 1995).

Additional Studies on Expatriate Executives in Business

Several authors (Hutchings, 2003; Varner & Palmer, 2002) mentioned that one of the key aspects identified in the literature as contributing towards achieving effectiveness of expatriates was cross-cultural training. Furthermore they suggested that expatriate preparation should be provided by the organization prior to the assignment. An expatriate's own cultural background greatly influenced how successful he/she will be in a foreign assignment. Therefore, self awareness, analysis of one's own values, and their effects on behavior need to be an integral part of expatriate training both before and during the foreign assignment. Once the

expatriate understands his/her own cultural orientation, he/she can much better focus on relevant elements in the target or host culture and make the changes in strategy necessary to achieve organizational goals.

The time and costs invested in providing expatriates and their families with such cultural awareness briefings that would reduce their difficulties in adjusting in both business and social forum would certainly contribute to minimizing the risk of early returns of expatriates and the potentially more damaging cultural offense and alienation of local employees and business partners (Hutchings, 2003).

In general, expatriates are sent overseas to fill job assignments when qualified local country nationals cannot be found to fulfill the needed requirements (Dowling, Schuler & Welch, 1994). Any position where local country personnel lack the expertise or knowledge to adequately perform the required functions may served as a potential expatriate assignment (Geber, 1992). Expatriates usually originate from the organizational headquarters where such expertise either currently exists or is recruited (Kobrin, 1984; Parker, Heira, Hatem, 1996). Early termination of an expatriate assignment is considered a failure that could significantly impact the organization (Tung, 1984; Tung, 1987). Thus, staffing positions with expatriates should meet a critical business need to ensure the greatest benefit to the organizations (Tung, 1988). Potential benefits of expatriate assignments include developing local country personnel, establishing high level contacts with host country governments, serving key clients on a global basis, and developing a cadre of internationally competent managers (Handy & Barham, 1990; Harvey, 1997).

While the benefits of strategically implemented expatriate staffing can be numerous, the costs associated with expatriate assignments are high (Handy & Barham, 1990).

In 1979, the direct costs (training, travel, salary, and relocation expenses) attributed to early termination of an expatriate assignment have been estimated between $55,000 and $80,000 depending on the exchange rate and location of the assignment (Misa & Fabricatore, 1979). According to Ioannou (1995), the cost of bringing the failed manager and his family home is estimated at $250,000. In March 1996, Foster-Higgins Inc. conducted a privately funded survey of 500 organizations and 500 expatriates associated with these organizations (Aschkenasy, 1997). Responses were received from 190 human resource departments and 171 expatriates. The findings indicate that expatriate compensation and benefits packages were at least two and a half times as expensive as hiring local country nationals to fill the same positions. In some countries, organizations are investing over five times as much to employ expatriate staff as they would hire their local country counterparts. Expatriate assignments are an expensive business solution and many organizations are reducing the number of expatriates they employ. Additionally, there are hidden costs involved in expatriate failure that reach far beyond the direct costs associated with compensation and benefits (Nelson, 1999; Aschkenasy, 1997).

Costs associated with losing key client contacts, jeopardizing government relations, affecting host country employee morale, and sagging productivity are difficult to measure. While overseas, the expatriate may also suffer from a loss of self-esteem, self-confidence, and prestige among peers (Mendenhall & Oddou, 1978;

Mendenhall & Oddou, 1985). Additionally, measuring expatriate performance has proved to be extremely difficult, costly, and often neglected by organizations (Schuler, Fulkerson & Dowling, 1991; Harvey, 1997; Nelson, 1999). This lack of performance assessment data has made it difficult to reintegrate expatriates into their home country organizations (Harvey, 1997). Naturally, this situation has led to great dissatisfaction among returning expatriates resulting in high turnover of repatriated personnel. These addition hidden costs arising out of expatriate failure may lead to a loss in market share. Thus, organizations have a vested financial interest in ensuring expatriate success. A number of studies have been conducted to profile successful expatriates. These profiles can be broken down into three major categories including: reasons for expatriate failure, predictors of expatriate success, and profiles of successful expatriates.

Reasons for Expatriate Failure

Tung (1981) found that among American companies surveyed the reasons for expatriate failure were cited to be (in descending order of importance) inability of the spouse to adjust, manager's inability of the spouse to adjust, manager's inability to adjust, other family reasons, manager's personal or emotional maturity, and inability to cope with the larger overseas responsibility. Interestingly, in repeating this element of the study with the Japanese organizations, the reasons were ranked in almost exact opposite order of the American organizations. Among European organizations, the only reason for expatriate failure that respondents consistently

marked was the inability of the spouse to adjust. Similar studies have been conducted with Japanese (Allen, 1988), British (Hamill, 1987), and Australian expatriates (Dowling & Welch, 1988; Welch, 1990). These findings from studies conducted with non-American expatriates serve to underscore that the reasons for American expatriate failure are uniquely different from other cultures. Failure rates among American expatriates are particularly high when compared to other cultures (Tung, 1987; Hendry, 1994). In fact, nearly 50% of American expatriates fail to complete the full length of their overseas assignment (Ioannou, 1995). Adding to this staggering figure is the fact that nearly 25% of American expatriates returning to their U.S. organizations leave the organization within one year (McFarland, 1995; McFarland 1997). Researchers point out that there are two factors organizations can control that directly influence expatriate success: improved selection practices for overseas assignments and improved preparation of expatriates through cross-cultural training (Mendenhall & Oddou, 1985; Harris & Moran, 1996).

The relatively poor success rate of American expatriates, coupled with the high costs associated with expatriate and repatriate failure has led U.S. organizations to spend considerable effort in examining the characteristics that help to predict expatriate success for overseas staffing purposes (Nelson, 1999).

Expatriates in the Hospitality Industry

In the hospitality industry, expatriate management is becoming very crucial as more hotel chains are now seeking expansion into overseas markets. Ruddy

(1991) conducted a study on career development of general managers in Pacific Asia and found that 68% of hotel managers were from Europe and North America. As more multinational hotel chains are setting their sights on Pacific Asia, the opportunities for expatriates working in that part of the world had increased.

As the need for international management in hospitality grows, the use of expatriates to run foreign operations is increasing as well (Li, 1995; Scullion, 1991). However, despite the important role that expatriate managers can play, many executives have paid little attention either to their selection and training or the role they could play in the overall organization (Li, 1995; Boyacigiller, 1990). Expatriates sent overseas without adequate training often can not adjust to the work life overseas which could affect the management of the business.

International expansion brings to the hotel chains many unique problems in the management of human resources, the most fundamental of which is the necessity for managers to play bicultural or multicultural roles (Robock and Simmonds, 1983). With international transfers becoming more frequent, hotel chains have to determine new policies and procedures to ensure that such moves are successfully administered. Powers (1992) indicated that multinational lodging firms had to hire expatriates to work in hospitality operations at overseas locations because some countries do not have qualified managers. Boyacigiller (1990) indicated that multinational companies must view expatriation as a strategic tool to develop future managers with a global orientation and to manage key organizational and country linkages.

Additional Studies on Expatriate Executives in Hospitality

According to Hu, Cai and Kavanaugh (2001), training should be an integral component of staff development in hospitality. For multinational hotel companies, training can be a good vehicle to promote employees to managerial positions to minimize the current dependence on more expensive expatriate managers. Different levels of training programs should be offered to individual employees based on their current skills and competencies, as well as the results of performance appraisals.

Hotels should identify those employees who desire to enter the rank of management and have the potential for promotion. Customized training programs can be tailored to the needs of the organization and likely candidates (Hu, Cai, & Kavanaugh, 2001). Furthermore, Barber and Pittaway (2000) indicated that cross-cultural training, recruitment and selection might be suitable for hospitality expatriate executives.

Exploring the reasons for expatriate failure has enabled researchers to begin profiling some predictors that could help ensure expatriate success. Tung (1982) examined selection practices of 80 U.S. multinational organizations. The variables leading to expatriate success were grouped into four general areas: technical competence on the job, personality traits or relational abilities, environmental variables, and family situation. The findings indicate that U.S. organizations most often relied on past performance ratings of (or directly tested for) technical abilities. Only five percent of organizations tested for relational abilities although the majority of respondents agreed that relational abilities were very important to overseas

assignments. In fact, among executive-level personnel being sent on expatriate assignment three of the five most important selection criteria were found to be relational abilities. The top five selection criteria among executive level expatriates were found to be: communication skills, managerial talent, maturity, emotional stability, and adaptability to new environment settings. Respondents considered the primary executive-level selection criteria to be technical ability. Technical ability has been found to be the primary expatriate selection criteria for most U.S. organizations (Hixon, 1986; Mendenhall, Dunbar & Oddou, 1987; Mcenery & DesHarnais, 1990; Weeks, 1992; Tung; 1992; Ioannou; 1995; Parker, Zeira & Hatem, 1996). These findings indicate that non-technical factors have gained in importance in the expatriate selection process in recent years. In fact, researchers in the area of expatriate selection are quick to point out that technical ability is not sufficient to ensure success (Nelson, 1999).

Mendenhall & Oddou (1985), in a synthesis of expatriate research, found four dimensions critical to the expatriate adjustment process: the self-oriented dimension, the others-oriented dimension, the perceptual dimension, and cultural toughness dimension. The self-oriented dimension is made up of three sub-factors: reinforcement substitution – the ability to replace activities that bring pleasure and happiness in the target culture; stress reduction – the ability to handle the stress of working within unknown culture; technical competence – the ability to accomplish the purpose of the overseas assignment. The others-oriented dimension consists of two sub-factors: relationship development – the ability to develop long-lasting

friendships within the target culture; and willingness to communicate – the ability to communicate with host country nationals in their own language. The perceptual dimension encompasses the ability to understand why foreigners behave the way they do. It is essential that in understanding of other people's behavior the expatriate remain free of bias and takes the time to fully understand the local situation before making judgments (Harris & Moran, 1996). Finally, the cultural toughness dimension encompasses how difficult it is to adapt to a given target culture. Some cultures are very different from the expatriate's home culture and therefore, are more difficult to adapt to (Elashmawi & Harris, 1991; Harris & Moran, 1996). The degree to which a potential expatriate is able to balance these four dimensions aids in predicting the success the candidate may have overseas (Mendenhall & Oddou, 1986). Technical expertise makes up only a small portion of the expatriate adjustments process (Mendenhall & Oddou, 1978; Mendenhall & Oddou, 1986; Nelson, 1999).

Hofstede (1980) examined culturally related values associated with working within IBM. He conducted surveys and interviews with over 500 employees in 40 countries. As overseas operations and host country personnel are often underrepresented in international studies (Nelson, 1999; Parker, Zeira & Hatem, 1996), Hofstede (1980) sought to balance all viewpoints by selecting matched groups of employees – samples of the same size and demographic make-up – in each of the 40 subsidiaries. The findings indicate that there are four major cultural factors that differentiate people all over the world: power distance, masculine-feminine,

individualism-collectivism, and uncertainty avoidance. The extent to which an expatriate is able to understand, compensate for, and acknowledge these differences affected the success of the overseas assignment. These findings were later verified with follow-up studies in other organizations (Hofstede & Bond, 1984; Hofstede, 1991). As a result of these follow-up studies a fifth factor, orientation towards time, was added to this framework in 1991. Hofstede (1991) feels that the distinguishing characteristics of successful expatriates are their ability to acknowledge, balance, and work with cultural differences (Nelson, 1999).

Attributes of Successful Expatriates

Parker, Zeira, and Hatem (1996) examined success and performance criteria of international joint venture managers. They surveyed 35 academicians, 150 international joint venture managers, and 70 general managers of wholly-owned subsidiaries. All of the international joint venture managers and general managers were either currently expatriates or had held at least one expatriate assignment sometime in their careers. Respondents were asked to rate 50 items associated with the work of expatriate joint venture managers. The findings indicate 30 primary characteristics that contribute to international joint venture manager success. These 30 characteristics were grouped into eight factors including (in order of importance): international management skills/knowledge, relational ability, family adjustment, prior experience, adaptability, technical knowledge, and demographics. Technical knowledge and ability were not considered to be the factors that distinguished

excellent international joint venture managers. The importance of people and relational skills as a critical factor of expatriate success has long been established (Tung, 1987; Gertsen, 1990; Adler & Peterson, 1991).

Barham and Devine (1990) sought to determine the key competencies of the international manager. They surveyed 250 European organizations asking expatriate managers to describe the competencies attributed to highly successful expatriates. Technical qualifications, functional expertise, and professional experience were not listed as competencies that distinguished highly successful expatriates; however, Barham and Devine (1990) acknowledge that expatriates could not hope to succeed in their functional roles without these functional competencies. Distinguishing competencies of successful expatriate managers include (in descending order of importance) strategic awareness, adaptability to new situations, sensitivity to different cultures, ability to work in international teams, language skills, understanding international marketing, relationship skills, international negotiation skills, self-reliance, high task-orientation, open, non-judgmental personality, understanding international finance, and awareness of own cultural background. The majority of expatriate competencies uncovered in this study involved broad qualities having more to do with interpersonal skills and personal characteristics than with technical expertise. Barham and Devine (1990) argue that the best way to develop international qualities among managers is through expatriate experiences. In fact, a relatively new trend among internationally active businesses has been to make

expatriate experience a mandatory requirement prior to promotion into senior executive positions (Coulson-Thomas, 1990a; Geber, 1992; Weeks, 1992).

A number of multinational organizations, including 3M, Pepsi, Johnson & Johnson, Colgate, and Motorola, have made expatriate experience a requisite to promotion (Geber, 1992). Expatriate experience is a relatively new criterion for promotion among even the most progressive internationally-minded American organizations. In fact, in 1989 only six percent of Fortune 500 organizations reported that foreign assignments were essential for senior executive careers. A further 49% felt that foreign experience was completely immaterial (Hambrick, Korn, Frederickson & Ferry, 1989). Multinational organizations must become increasingly concerned with fostering international qualities among their upper management team or they risk confronting the highest executive turnover in history (Hambrick, Korn, Frederickson & Ferry, 1989; Adler & Bartholomew, 1992). In the future, the expatriate assignment may serve as a stepping stone towards advancing into executive positions within multinational organizations.

Expatriate Adjustment

The mistake that most companies make in structuring international assignments is that they do not take into account the reality of the process of expatriate adjustment. According to Mendenhall, Kuhlmann & Stahl (2001), developing global competencies does not involve acquiring knowledge and adding it into one's existing worldview. Expatriate adjustment is not a linear accumulation of

knowledge. To adjust to a new culture requires learning and internalizing new worldviews – new cognitive software systems – that must run simultaneously with one's own, traditional, cultural software system. Then, these separate software systems must be integrated into a new, more complex software system, one that sees more deeply into the complexities of the reality of the context in which the expatriate finds himself or herself.

Being an expatriate requires walking into an entirely new world, which in turn, requires one to become a new person in order to excel. Not all people are suited for this type of journey, and not all people can handle the experience (Mendenhall & Oddue, 1985). Individuals who often seem the most talented because of their professional skills often struggle overseas, and return home as frustrated managers who are glad to be back on familiar turf (Mendenhall et al., 2001).

Spreitzer et al. (1999) noted that individuals who are likely to succeed as international executives manifest inquisitiveness competency and that it motivates them to learn and to enjoy the very process of learning. Such people proactively seek formal and informal experiences to learn about themselves, the work environment, the organization, and the external environment, and how these elements interact (Mendenhall, Kuhlmann & Stahl, 2001).

Management Skills

The most fundamental management skills are technical, interpersonal, conceptual, diagnostic, communication, decision-making and time-management

skills. Technical skills are the skills necessary to accomplish or understand the specific kind of work being done in an organization. Technical skills are especially important for first-line managers. These managers spend much of their time training subordinates and answering questions about work-related problems. They must know how to perform the tasks assigned to those they supervise if they are to be effective managers (Griffin, 2005).

Managers spend considerable time interacting with people both inside and outside the organization. The manager also needs interpersonal skills – the ability to communicate with, understand, and motivate both individuals and groups. As a manager climbs the organizational ladder, she must be able to get along with subordinates, peers, and those at higher levels of the organization. Although some managers have succeeded with poor interpersonal skills, a manager who has good interpersonal skills is likely to be more successful (Griffin, 2005).

Conceptual skills depend on the manager's ability to think in the abstract. Managers need the mental capacity to understand the overall workings of the organization and its environment, to grasp how all the parts of the organization fit together, and to view the organization in a holistic manner. This allows them to think strategically, to see the big picture, and to make broad-based decisions that serve the overall organization (Griffin, 2005).

Successful managers also possess diagnostic skills, or skills that enable a manager to visualize the most appropriate response to a situation. A physician diagnoses a patient's illness by analyzing symptoms and determining their probable

cause. Similarly, a manager can diagnose and analyze a problem in the organization by studying its symptoms and then developing a solution (Griffin, 2005).

Communication skills refer to the manager's abilities both to effectively convey ideas and information to others and to effectively receive ideas and information from others. These skills enable a manager to transmit ideas to subordinates so that they work well together properly, and to keep higher-level managers informed about what is going on. In addition, they help the manager listen to what others say to understand the real meaning behind letters, reports, and other written communication (Griffin, 2005).

Effective managers also have good decision-making skills. Decision-making skills refer to the manager's ability to correctly recognize and define problems and opportunities and to then select an appropriate course of action to solve problems and capitalize on opportunities. No manager makes the right decision all the time. However, effective managers make good decisions most of the time. And, when they do make a bad decision, they usually recognize their mistake quickly and then make good decisions to recover with as little cost or damage to their organization as possible (Griffin, 2005).

Finally, effective managers usually have good time-management skills. Time management skills refer to the manager's ability to prioritize work, to work efficiently, and to delegate appropriately. As already noted, managers face many different pressures and challenges. It is too easy for a manager to get bogged down doing work that can easily be postponed or delegated to others. When this happens,

unfortunately, more pressing and higher-priority work may get neglected (Griffin, 2005).

According to McCall and Hollenbeck (2002), the following are major competencies of an expatriate executive:

- Open-minded and flexible in thought and tactics. The person is able to live and work in a variety of settings with different types of people and is willing and able to listen to other people, approaches, and ideas.

- Cultural interest and sensitivity: The person respects other cultures, people, and points of view; is not arrogant or judgmental; is curious about other people and how they live and work; is interested in differences; enjoys social competency; gets along well with others; is empathic.

- Able to deal with complexity: The person considers many variables in solving a problem; is comfortable with ambiguity and patient in evolving issues; can make decisions in the face of uncertainty; can see patterns and connections; and is willing to take risks.

- Resilient, resourceful, optimistic, and energetic: The person responds to a challenge; is not discouraged by adversity; is self-reliant and creative; sees the positive side of things; has a high level of physical and emotional energy; is able to deal with stress.

- Honesty and integrity: Authentic, consistent, the person engenders trust.

- Stable personal life: The person has developed and maintains stress-resistant personal arrangements, usually family, that support a commitment to work.

- Value-added technical or business skills: The person has technical, managerial, or other expertise sufficient to provide his or her credibility.

Cross Cultural Training

The term cross cultural training refers to a variety of different training courses. Each in essence aims to develop awareness between people where a common cultural framework does not exist. In general, cross cultural training has two parallel strands: cross cultural awareness training and culture/country specific training. Cross cultural awareness training deals with the manifestations of culture in the workplace and has many applications. Its main purpose is to evaluate and constructively tackle the challenges cross cultural differences can bring to the workplace (Gliatis, 2003). A few examples can illustrate the different applications of cross cultural awareness training: Cross cultural team building training will aim to raise team members' awareness of each other culturally in order to foster mutual trust, respect and understanding. The result of which will be clearer lines of communication. Cross cultural management training aims to equip management staff with the knowledge and skills to effectively supervise a multi-cultural staff. This results in a more convivial and understanding work environment. Cross cultural negotiation training assists negotiators involved with foreign clients or customers

with whom they are discussing possible terms and conditions. Cultural diversity training offers HR staff support in helping them understand their responsibilities to ethnic minority staff and/or look at ways of nurturing harmonious interpersonal relationships at work (Kwintessential, 2006).

Culture/country specific training is generally aimed at individuals or teams that regularly visit a foreign country or who frequently interact with overseas clients or colleagues. Such training usually focuses on areas such as values, morals, ethics, business practices, etiquette, protocol or negotiation styles with reference to one country. This better equips participants with the key skills that will help in building successful business relationships (Kwintessential, 2006).

Cross Cultural Communication

The advent of the global economy is changing the fundamental nature of our governments, businesses, organizations and populations. In short, we are no longer constrained by state boundaries but have all become part of an interdependent international network. One of the key changes this has triggered is the need to communicate effectively with different people in different languages and from different cultures. It is now recognized that linguistic and cultural knowledge are two of the most vital areas of knowledge that organizations must come to acquire if they are to integrate, progress and succeed in the marketplace (Kwintessential, 2006).

Cross Cultural Negotiation

Cross cultural negotiation training is aimed at business personnel either traveling abroad for negotiations or hosting clients/customers from abroad. This includes etiquette of meeting, greeting, verbal and non-verbal communication, gift-giving, entertaining, building rapport, negotiation tactics, facts and statistics of negotiation (Kwintessential, 2006).

Youth Cross Cultural Training

This training program is designed for and aimed at children and teenagers who may be accompanying their expatriate parents abroad. This involves the children of the family in the relocation process and to help minimize the negative effects of culture shock. The courses are orientated in style and content to issues facing the younger members of the family (Kwintessential, 2006).

Business and Culture

This provides an introduction to and understanding of the cross cultural field, empowering participants to go back to their businesses with fresh perspectives. This guide the executives through the academic models of cross cultural understanding and apply them to real life situations – demonstrating how culture influences business relationships, practices and policies and providing strategies to using it positively (Kwintessential, 2006).

Business Etiquette

Business etiquette trainings are aimed at globe trotters – business people traveling to foreign countries for short-term visits. Such clients may be going abroad for business meetings, negotiations, trade fairs, information gathering or on short-term visits. This helps prestigious clients get business results through giving them an understanding of the inns and outs of the target cultures the travel to for business (Kwintessential, 2006).

Cross Cultural Team Building

The companies and organizations of today consist of staff from the four corners of the globe. Colleagues work in multi-cultural teams either in the same office or across borders. Issues can and do rise in areas such as approach to management, expectations, decision making, planning, conflict resolution and communication styles. It is paramount that clear lines of communication are promoted and cross cultural misunderstandings minimized if such multi-cultural teams are to function effectively (Kwintessential, 2006).

Cultural Diversity Training

The issue of diversity and multi-culturalism is now a matter of importance for businesses. It is now imperative that employers take into consideration the impact multi-cultural diversity can have on both the harmony of the workplace and possible legal implications discrimination. This is designed to help companies and

organizations with their multi-cultural diversity issues in the workplace. This provides an overview of multi-cultural issues in the workplace and/or to provide insight into a particular religion, race or nationality. As well as giving guidance on the particulars of certain religious or ethnic groups, and seek to provide practical steps to help overcome diversity issues within the workplace (Kwintessential, 2006).

Dimensions of a Successful Expatriate Assignment

Based from the literature the following elements were selected as attributes that could influence the success of an expatriate's assignment overseas:

Improved Selection Criteria

Valued-added Technical or Business Skills

- The person has technical, managerial, or other expertise sufficient to provide his or her credibility.

- Understands a variety of foreign business systems

- Coordinates the budgeting process between foreign operations and headquarters.

Personality Traits or Relational Abilities

- Resilient, resourceful, optimistic, and energetic

- Honesty and integrity

- Emotional stability

- Adaptability to new environment settings

Family Situation

- Stable personal life – the person has developed and maintains stress-resistant personal arrangements, usually family, that support a commitment to work.

Cross-Cultural Training

- Ability to acknowledge, balance and work with cultural differences.

- Orientation towards time

- Demonstrates cultural empathy

Expatriate Adjustment

Self-oriented Dimension

- Able to deal with complexity – the person considers many variables in solving a problem; is comfortable with ambiguity and patient in evolving issues; can make decisions in the face of uncertainty; can see patterns and connections; and is willing to take risks.

- Resilient, resourceful, optimistic, and energetic – the person responds to challenge; is not discouraged by adversity; is self-reliant and creative; sees the positive side of things; has a high level of physical and emotional energy; is able to deal with stress.

- Technical competence

Others-oriented Dimension

- Open-minded and flexible in thought and tactics – the person is able to live and work in a variety of settings with different types of people and is willing and able to listen to other people, approaches, and ideas.

Perceptual Dimension

- Ability to understand why foreigners behave the way they do

Cultural Dimension

- Awareness of own cultural background

- Cultural interest and sensitivity – the person respects other cultures, people, and points of view; is not arrogant or judgmental; is curious about other people and how they live and work; is interested in differences; enjoys social competency; gets along well with others; is empathic.

- Language skills

Management Skills

Communication Skills

- Effectively conveys ideas and information to others

- Effectively receive ideas and information from others

Global Business Skills

- Understanding international finance

- International negotiation skills

- Understanding international marketing

- Ability to work in international teams

Interpersonal Skills

- Get along with subordinates, peers, and those at higher levels of the
  organization.

Conceptual Skills

- Manager's mental capacity to understand the overall workings of the
  organization and its environment.

- Grasps how all the parts of the organization fit together.

- Views the organization in a holistic manner.

Summary

The literature indicated that there were a number of underlying dimensions
that contributed to the success of hospitality expatriate executives on their overseas
assignment. Some of these dimensions were: personal competencies, expatriate
adjustment, management skills and cross-cultural training. Numerous studies have
attempted to determine what makes hospitality expatriate executives successful and a
large variety of managerial skills have been generated. The rapidly increasing trend
toward internationalization of business has fostered an interest in examining
important management skills that international hospitality executives should possess.
Successful expatriates are being profiled as organizations have found that expatriate

assignments are an effective, yet expensive, means of developing international qualities in their managers. The increasing globalization of business appears to have led to the emergence of an international business workforce that shares a unique set of cultural beliefs, attitudes, and behaviors. The thrust of this dissertation was to examine the training and preparation of hospitality expatriate executives that led to a successful assignment.

CHAPTER III

METHODOLOGY

Introduction

This study focused specifically on the preparation and training of hospitality

expatriate executives concerning their assignments to their host countries. This chapter

includes the introduction, subjects, instrument, validity and reliability, research design,

procedure, and data analysis.

Research Design

A non-experimental descriptive or survey research design was utilized for this

study. According to Gay and Airasian (2003) typical survey studies are concerned with

assessing attitudes, opinions, preferences, demographics, practices and procedures

(p.277). Since this study determined expatriate executives' characteristics, it follows

that a descriptive or survey research design was useful.

Sample

The target population of this study included the representatives of the

associations who are members of the International Hotel & Restaurant Association

(IH&RA). The IH&RA is an international trade association exclusively devoted to

promoting and defending the interests of the hospitality industry worldwide. Members of the IH&RA are different lodging and foodservice associations and hospitality properties all over the world. These associations and hospitality properties have representatives to the international trade association. Representatives are the top executives, managers, directors, controllers and researchers. For this particular study, only the representatives of the lodging associations and properties were part of the population. The target population was selected based upon their affiliation to the same association.

The population was the expatriate executives of hotels who represent the lodging property to the association. The lodging properties where these representatives worked were located all over the world. The sampling procedure used was cluster sampling. Cluster sampling is a probability sampling distinguished by a two-step procedure in which (1) the parent population is divided into mutually exclusive and exhaustive subsets, and (2) a random sample of subsets is selected. If the investigator then uses all the population elements in the selected subsets for the sample the procedure is one-stage sampling; if a sample of elements is selected probabilistically from the subsets, the procedure is two-stage cluster sampling (Churchill & Brown, 2004, p. 437).

Cluster sampling randomly selects groups, not individuals. All the members of selected groups have similar characteristics. For example, instead of randomly selecting from all fifth graders in a large school district, one could randomly select fifth-grade classrooms and use all the students in each classroom. Cluster sampling is most useful when the population is very large or spread out over a wide geographic area.

Sometimes it is the only feasible method of selecting a sample because it is not always possible to obtain a list of all members of the population. Also, educational researchers frequently cannot select and assign individual participants, as they may like (Gay & Airasian, 2003).

The steps in cluster sampling are not very different from those in random sampling. The major difference is that random selection of groups (clusters) is involved, not individuals. Cluster sampling involves the following steps: (1) Identify and define the population; (2) Determine the desired sample size; (3) identify and define a logical cluster (neighborhood, school, city block, etc.); (4) List all clusters (or obtain a list) that make up the population of clusters; (5) Estimate the average number of population members per cluster; (6) Determine the number of clusters needed by dividing the sample size by the estimated size of a cluster; (7) Randomly select the needed number of clusters (using a table of random numbers); (8) Include in your study all population members in each selected cluster (Gay & Airasian, 2003, p. 109). Cluster sampling can be carried out in stages, selecting clusters within clusters. For example, a district in a state, then schools in the district, and then classrooms in the schools could be randomly selected to sample classrooms for a study. This process is called multistage sampling (Churchill & Brown, 2004).

One common misconception about cluster sampling is that it is appropriate to randomly select only a single cluster. It is not uncommon, for example, for some researchers to define a population as all fifth graders in Payne County, to define a cluster as a school, and to randomly select only one school in the population. Here is an

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example of a cluster sampling: (1) The population is all 5,000 teachers in the superintendent's school system; (2) The desired sample size is 500; (3) A logical, useful cluster is a school; (4) The superintendent has a list of all the schools in the district; there are 100 schools; (5) Although the schools vary in the number of teachers per school, there is an average of 50 teachers per school; (6) The number of clusters (schools) to be selected equals the desired sample size, 500, divided by the average size of a cluster, 50. Thus, the number of schools needed is (500 ÷ 50) = 10; (7) Therefore, 10 of the 100 schools are randomly selected by assigning a number to each school and using a table of random numbers; (8) All the teachers in each of the 10 schools are in the sample (10 schools, 50 teachers per school on average, equals the desired sample size). Thus, the interviewer could conduct interviews at 10 schools and interview all teachers in each school instead of traveling to a possible 100 different schools. The advantages of cluster sampling are evident. As with most things, however, nothing is all good. Cluster sampling has several drawbacks. For one thing, the chances are greater of selecting a sample that is not representative of the population. One way to compensate for this problem is by selecting a larger sample of clusters (Gay & Airasian, 2003, p. 110).

Any location within which one finds an intact group of similar characteristics (population members) is a cluster. Examples of clusters are classrooms, schools, city blocks, hospitals and department stores. Cluster sampling usually involves less time and expense and is generally convenient. It is easier to obtain permission to use all the students in several classrooms than selecting a few students in many classrooms.

Similarly, in conducting a survey, it is easier to use all the people in a limited number of city blocks than a few people in many city blocks. In each case one should note that cluster sampling would be easier than either simple random sampling or stratified sampling (Churchill & Brown, 2004).

The goal in cluster sampling is to form subgroups that are similar to each other and are each small-scale models of the population. Each cluster should reflect the diversity of the whole population. Cluster sampling is a probability sampling technique where the entire population is divided into groups or clusters, and a random sample of these clusters is selected. Cluster sampling is typically used when the researcher cannot get a complete list of the members of a population they wish to study but can get a complete list of groups or clusters of the population. It is also used when a random sample would produce a list of subjects so widely scattered that surveying them would prove to be far too expensive (Gay & Airasian, 2003), for example, hospitality expatriate executives who live in different parts of the world.

Probability one-stage cluster sampling was used to determine the sample for this particular study since member-associations and member-properties were considered clusters. All observations in the selected clusters are included in the sample (Field, 2005). There were eighty-two hospitality associations and sixty hotel properties. A simple random sampling was conducted to determine which hospitality associations and hotel properties were included in the survey. Five clusters were identified from the associations and three clusters were identified for the hotel properties. There were a total of eight clusters or organizations. The eight organizations were surveyed using the

census technique. Email addresses of employees were then collected from the eight organizations. There were two hundred email addresses.

The sampling frame was the list of email addresses. The investigator then sent an email message to the two hundred email addresses as a blind carbon copy (bcc). Sending the email message as bcc ensured confidentiality and anonymity of the respondents. The email message was the cover letter of the survey which contained the purpose of the study, Institutional Review Board contact person, the researchers contact name, number and email addresses, the length of time of the survey and a link to the online questionnaire. At this time, the investigator assumed that the cluster is a priori which means that the number of subjects within the cluster was not known.

Two primary criteria used to define the respondents: that the respondents had experience working as expatriate at least once in their career and they had worked or were working in the hospitality industry regardless of title or position. Participation in this study was voluntary.

Instrument

A Web-based questionnaire was developed by the researcher. The information in the questionnaire was based upon the literature and personal interviews. After collating the important attributes and variables from the literature, the researcher interviewed two (one retired and one active expatriate in a hotel facility in the southeastern part of United States) expatriates to confirm the accuracy and truthfulness of the information as indicated from the literature. Both scrutinized the list of the

attributes, skills and cross cultural training activities and they confirmed that the lists

represented the attributes, management skills and training programs they believed to be

related to the successful assignment of an expatriate executive. Their feedback was

relayed by word of mouth and via an electronic mail message.

The content of the questionnaire was then finalized and sent to the committee

chair and advisor for comments. After receiving approval from the committee, the

online questionnaire was then created in FrontPage 2003. FrontPage 2003 is part of the

Microsoft Office 2003 software which is used for designing web pages and web

surveys. It is similar to using Microsoft Word which is familiar to the investigator. It is

also easy and very user-friendly for those who have no knowledge of web page and web

survey design (Causin & Martin, 2002; Microsoft, 2001).

Pilot Study

The questionnaire was a self-administered instrument. It was pilot tested prior to

administration to the sample. The pilot study of the data collection process was

conducted last week of November 2006. A pilot study was conducted for one week

among thirty (30) subjects to test the content and clarity of the questionnaire. These

subjects were individuals and colleagues who are or who have worked as expatriates in

one way or another. Some of these individuals were members of the International

Council on Hotel and Restaurant Institution Education (I-CHRIE) and some were

colleagues from the School of Hotel and Restaurant Association at Oklahoma State

University. They were identified by the researcher based on her knowledge of their background.

The pilot study respondents were encouraged to critique the questionnaire. Most of the comments were use of words, tenses and the sentence structure. They all liked the lay-out and the length of the questionnaire. The researcher noted their comments and applied them to the questionnaire before it was finalized. The managers, executives and educators selected from these organizations confirmed the accuracy of the directions, reaffirmed the clarity of each behavior statement, and established approximately how long it might take to complete the survey. Additionally, these individuals were asked to review the list of statements to ensure that behaviors relevant to international success had not been inadvertently omitted. Pilot study subjects seemed to feel that the list of behaviors was exhaustive and complete. The questionnaire was modified based on the result of the pilot study.

Email Message

A letter was sent to each email address of the contact person of the organization and that person was asked to distribute the email message to their organizational listserve. In order to generate interest among potential respondents, the letter first outlined the purpose of the study and the relevance of the findings to the hospitality industry and discipline. A monetary incentive was promised to the participants to encourage them to participate. The incentive was part of a drawing for four prizes of $150, $100, $75 and $50. An executive summary of the study findings was promised to

each participant as an additional incentive to participate. The initial contact letter also explained how and why a particular executive or manager was chosen, clarified that approximately 5 to 10 minutes would be needed to complete an online survey instrument. The participants were assured that participation in the study was confidential and anonymous and that data was reported in aggregate form.

Validity

The ideal in any scale is to "generate a score that reflects true differences in the characteristic one is attempting to measure, without interference from irrelevant factors" (Churchill, 1996, p. 402). Any measurement instrument that accurately measures what it was intended to measure may be considered as valid. Validity refers to the relationship between a concept and its indicators. The validity of a measuring instrument is defined as the extent to which differences in scores on a measuring instrument reflect true differences among individuals, groups, or situations in the characteristic that it seeks to measure, or true differences in the same individual, group, or situation from one occasion to another, rather than constant or random error (Churchill, 2001; Cobanoglu, 2001).

Content validity of the measurement instrument adequately covers the most important aspects of the construct that is being measured (Churchill, 1996). According to Churchill (1996), the key to content validity lies in the procedures that are used to develop the instrument. One way would be to search the literature and see how other researchers defined and investigated the concept. After this stage, the researcher may

add and delete some items from the previous instrument. This study utilized the procedures suggested by Churchill (1996) to develop an instrument that has content validity by adopting measures used by many previous studies which have proved to be reliable and valid. The content validity measure used was engaging the expert advised of two expatriate executives in terms of validating the items or variables that the investigator gathered from the literature.

Reliability

Reliability concerns the extent to which a measurement of a phenomenon provides stable and consistent results. Reliability refers to the ability to obtain similar results by measuring an object, trait, or construct with independent but comparable measures (Churchill, 2000). Reliability establishes an upper bound on validity because an unreliable measure cannot be valid (Keppel, 1991). Internal consistency between the items in the measures were calculated using Factor Analysis and was estimated using the Cronbach's coefficient alpha. Cronbach's (1951) Alpha is a measure of internal consistency (reliability), generally used to assess the reliability of items in an index.

Alpha ranges from 0 to 1.0 and indicates the extent to which the items in an index are measuring the same thing. A common rule of thumb is that an Alpha of .70 or greater indicates acceptable internal consistency (Babbie, Halley & Zaino, 2000; Foster, 2001). Cronbach Alpha is the most widely used reliability measure to estimate the degree to which the items on a measure are representative of the domain of the construct being measured. Multiple authors (Babbie, Halley & Zaino, 2000; Nunnaly,

1978) have indicated 0.70 to be an acceptable reliability coefficient for social sciences

research but lower thresholds were sometimes used in the literature. The Cronbach's

coefficient alpha reliability of the instrument was calculated using SPSS. The coefficient

Alpha on the hospitality executives' attributes yielded a high reliability estimate of .958

with 28 items. The questions on the important management skills yielded a very high

reliability estimate of .982 with 10 items. For the items on the cross cultural training, it

yielded a moderately high reliability estimate of .862 with 7 items. This indicated

internal consistency of the scales of the instrument used.

Procedure

This study used a Web-based survey via an electronic mail (E-mail). According

to Gunn (2006) & Zanutto (2001), Web-based surveys are relatively cheap. The

average cost is $0.88 person. Web-based surveys have faster response rate; have

dynamic error checking capability; have the option of putting questions in random

order; have the ability to make complex skip pattern questions easier to follow; include

pop-up instructions for selected questions; have the use of drop-down boxes; and easier

to process data since responses could be downloaded to a spreadsheet, data analysis

package, or a database. Schaeffer & Dillman (1997) mentioned that using Web-based

surveys yield a 58% response rate. In addition, the researcher had the resources and

capability of developing a Web-based survey using Microsoft FrontPage 2003.

As mentioned in the instrumentation section of this chapter, FrontPage 2003

software is used for designing web pages and web surveys and has the capability of

transforming the questionnaire into a web-based or online survey. This online survey was housed in the data management server secured by the Information Technology (IT) office at Oklahoma State University. The IT office gave the researcher administrative rights for the site which means that the researcher was provided a log-in name and password and is the only person who can access the data. This was to ensure data security. They also created a Universal Resource Locator (URL) for the survey. The URL for this survey was http://frontpage.okstate.edu/STW/expatriateassignmentstudy/ . The letter which had the URL of the Web-based or online form was distributed to the sample via electronic mail. Please refer to Appendix D.

When the respondents submit the completed online form the server space with FrontPage extension automatically constructed a spreadsheet file and stored the data in a folder called private. Access to this folder was restricted. Only the survey administrator, in this case the researcher, had the access to the folder since it is password protected. This assured the security of the data that was placed in the private folder (personal communication by Ron Payne, October 06, 2006). After the data collection period, the link to the online questionnaire was disabled by the researcher.

It is mandatory that approval from the Institutional Review Board (IRB) for review of human subjects' research should be secured. After securing the IRB approval, the data collection began. Data collection started by sending an e-mail message along with a website address or the uniform resource locator (URL) to the sample. The URL is the address that defines the route to a file on the Web or any other Internet facility. URLs should be typed into the browser to access Web pages, and

URLS are embedded within the pages themselves to provide hypertext links to other pages (Techweb, 2002). The Web-based survey was uploaded for four weeks. Follow-up emails were sent every three days to assure that respondents fill out the survey and to encourage greater response rate. The researcher also used an incentive to increase the response rate. In order to be included in the drawing, the respondents were asked to provide their email addresses in question number 17. Only the ones who have email addresses were in the drawing.

The use of incentives was a heavily researched area in increasing response rate. Although several meta-analyses came to different conclusions, published reviews paint a clear picture with respect to incentives; they are effective in increasing the response rates for mail surveys (Miller & Salkind, 2002). Some of the evidence on the role of incentive value is conflicting. Some authors propose that each one-cent increase in prepaid incentive increases the response rate by 1%. Others propose a model of diminishing returns rather than a general linear trend. Finally, one review provides data that do not show a linear or increasing trend in response rates with increasing incentives. The bulk of the data suggest that there is some merit in increasing the value of the incentive (Miller & Salkind, 2002).

Specific recommendations on the amount to include reflect a social exchange theory, which suggests people do not like to feel obligated to others and therefore, be motivated to behave in ways that reduce obligations. Including a small token in a survey theoretically is enough to have potential respondents feel obligated to respond. A token cannot be so large, however, as to suggest payment for services rendered. Based

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on this theory and empirical research, a common suggestion is that a $.50 incentive

may increase response rates up to 50%. A $1 incentive often produces fewer responses

because the dollar is large enough to be perceived as a payment for services rendered

(Miller & Salkind, 2002).

The respondents were assured that their answers were kept confidential. After

data collection and data input procedures were completed, the survey data were

destroyed. Respondents filled out and submit the questionnaire online. The data were

stored in a private folder in the FrontPage extension database. It was in an Excel

format. When the survey ended, the data were coded in Excel before being imported to

SPSS 14.0 (SPSS, 2005).

Data Analysis

Internet surveys allow participants to enter data at their own, not the

experimenter's convenience (Davis, 1999). Web-based surveys can be designed to

check responses before they are entered, thus assuring that the data are well–structured

and free from missing values or out-of-range responses (Epstein, 2001). Furthermore,

data entry errors are eliminated because respondents' answers may be entered directly

into an analyzable database, completely eliminating the need for a separate process of

data entry (Epstein, 2001; Michalak, 1998; Pasveer & Ellard, 1998). The data collected

was coded and analyzed using the Statistical Package for Social Sciences 14.0 (SPSS

Inc, 2005).

The purpose of this study was to establish a model to prepare the expatriate executives for their assignment to their host countries by establishing a model to minimize expatriate failure. Specifically the study would:

- Establish a model for a successful hospitality expatriate executives' overseas assignment.

- Determine the important management skills of successful expatriate executives.

- Determine cross-cultural training activities that are provided for hospitality expatriate executives.

- Determine whether the expatriate executives' management skills vary by country of origin.

- Examine whether the expatriate executives' management skills vary according to the location of parent company.

Based on the research purpose above, the study would answer the following research questions: Research Question One: What are the components of a model for a successful hospitality expatriate executives' overseas assignment? The statistical analysis used was Exploratory Factor Analysis. Exploratory factor analysis attempts to identify underlying variables, or factors, that explain the pattern of correlations within a set of observed variables. It is often used in data reduction to identify a small number of factors that explain most of the variance observed in a much larger number of manifest variables (Field, 2005; Churchill & Brown, 2004).

Exploratory factor analysis is frequently used to develop questionnaires: if one wants to measure an ability or trait, one needs to ensure that the questions asked relate to the dimension that he or she intends to measure. The researcher found out that there were many failed assignments of hospitality expatriate executives. She decided to devise a questionnaire to measure the attributes of these expatriates. The researcher generated questions based on the literature and interviews with expatriates (both retired and current) and developed twenty eight questions. Each question was a statement followed by a five-point Likert scale ranging from 'not at all' through 'to a least extent' or to a moderate extent' or to a major extent' or 'to a great extent'. The questionnaire is attached in Appendix D.

Correlation coefficients fluctuate from sample to sample, much more so in small samples than in large. Therefore, the reliability of factor analysis is also dependent on sample size. Field (2005) reviews many suggestions about the sample size necessary for factor analysis and concludes that it depends on many things. In general over 300 cases would be adequate but communalities after extraction should probably be above 0.5.

The first thing to do when conducting a factor analysis is to look at the inter-correlation between variables. If our test questions measure the same underlying dimension (or dimensions) then we would expect them to correlate with each other. If we find any variables that do not correlate with any other variables (or very few) then the researcher should consider excluding these variables before the factor analysis is run. The correlations between variables can be checked using the correlate procedure to create a correlation matrix of all variables.

The opposite problem is when variables correlate too highly. Although mild multicollinearity is not a problem for factor analysis it is important to avoid extreme multicollinearity (i.e. variables that are very highly correlated) and singularity (variables that are perfectly correlated). Therefore, at this early stage we look to eliminate any variables that do not correlate with any other variables or that correlate very highly with other variables ($R < .9$). Multicollinearity can be detected by looking at the determinant of the R-matrix (Field, 2005).

As well as looking for interrelations, the researcher should ensure that variables have roughly normal distributions and are measured at an interval level (which Likert scales are). The assumption of normality is important only if one wishes to generalize the results of the analysis beyond the sample collected.

Running the Analysis

The Coefficients option produces the R-matrix, and the Significance levels option produced a matrix indicating the significance value of each correlation in the R-matrix. It is also possible to ask for the Determinant of this matrix and this option is vital for testing for multicollinearity or singularity. The determinant of the R-matrix should be greater than 0.00001; if it is less than this value then look through the correlation matrix for variables that correlate very highly ($R > .8$) and consider eliminating one of the variables (or more depending on the extent of the problem) before proceeding. The choice of which of the two variables to eliminate will be fairly arbitrary and finding multicollinearity in the data should raise questions about the

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choice of items within your questionnaire. KMO and Bartlett's test of sphericity

produces the Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett's test

(Field, 2005). The value of KMO should be greater than 0.5 if the sample is adequate.

Factor Extraction

There are several ways to conduct factor analysis and the choice of method

depends upon many things (Field, 2005). For this study, principal component analysis

which is the default in SPSS was used. The display box has two options: to display the

Unrotated factor solution and a Scree plot. The scree plot was described earlier and is a

useful way to establishing how many factors should be retained in an analysis. The

unrotated factor solution is useful in assessing the improvement of interpretation due to

rotation. If the rotated solution is little better than the unrotated solution then it is

possible that an inappropriate (or less optimal) rotation method has been used. The

unrotated factor solution was preferred by the investigator.

The Extract box provides options pertaining to the retention of factors. One had

the choice of either selecting factors with eigenvalues greater than a user-specified

value or retaining a fixed number of factors. For the Eigenvalues over option the

default is Kaiser's recommendation of eigenvalues over 1. It is best to run a primary

analysis with the Eigenvalues over 1 option selected, select a scree plot, and compare

the results (Field, 2005). The investigator decided to run the primary analysis with

Eigenvalues over 1 which was the default in SPSS. It generated four factors wherein

factor four had one item loading and the same item loaded in another factor and their

eigenvectors were almost the same value. Because of this, the researcher decided to rerun the analysis and specify the number of factors to 3.

The interpretability of factors can be improved through rotation. Rotation maximizes the loading of each variable on one of the extracted factors while minimizing the loading on all other factors. Rotation works through changing the absolute values of the variables while keeping their differential values constant. Varimax, quartimax and equamax are orthogonal rotations whereas direct oblimin and promax are oblique rotations. The exact choice of rotation depends largely on whether or not the researcher thinks that the underlying factors should be related. If the factors are expected to be independent then orthogonal rotations should be chosen. If, however, there are theoretical grounds of supposing that your factors might correlate then direct oblimin should be selected (Field, 2005). The rotated solution is displayed by default and is essential for interpreting the final rotated analysis (Field, 2005). For this study, the factors were considered orthogonal, thus varimax rotation with Kaiser normalization was selected.

By default SPSS listed variables in the order in which they are entered into the data editor. Although this format is often convenient, when interpreting factors it can be useful to list variables by size. By selecting Sorted by size, SPSS will order the variables by their factor loadings. There is also the option to *Suppress* absolute values less than a specified value (by default 0.1). This option ensures that factor loadings within ± 0.1 are not displayed in the output. This option is useful for assisting in interpretation; however, it can be helpful to increase the default value of 0.1 to either

0.4 or a value reflecting the expected value of a significant factor loading given the sample size. For this study, it was decided that the factors should be sorted by size and the value was suppressed and set at 0.4 based on the sample size, n=70.

SPSS showed an abridged version of the R-matrix. The top half contained the Pearson correlation coefficient between all pairs of questions whereas the bottom half contained the one-tailed significance of these coefficients. The correlation matrix was used to check the pattern of relationships of the different variables. First, the significance values were scanned to look for any variable where the majority of values were greater than 0.05. Then the correlation coefficients themselves were scrutinized for any value greater than 0.9. If any were found then a problem could arise because of singularity in the data. Singularity is determined by the determinant listed at the bottom of the matrix. In case singularity in the data occurs, it is best to eliminate one of the two variables causing the problem (Field, 2005). For this data, there were no correlation coefficients greater than .9 and its value is 0.01369 which is greater than the necessary value of 0.00001. Therefore, multicollinearity is not a problem for these data. To sum up, all questions in the hospitality expatriate executives' questionnaire (HEEQ) correlate fairly well and none of the correlation coefficients were particularly large; therefore there was no need to eliminate any questions at this stage.

Important information that SPSS showed was the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity. The KMO statistic varies between 0 and 1. A value of 0 indicates that the sum of partial correlations is large relative to the sum of correlations, indicating diffusion in the pattern of

correlations (Field, 2005). A value close to 1 indicates that patterns of correlation are relatively compact and so factor analysis should yield distinct and reliable factors. Kaiser (1974) recommends accepting values greater than 0.5 as acceptable (values below this should lead you to either collect more data or rethink which variables to include) (Field, 2005). For these data the value was .510, which was acceptable.

Bartlett's test of sphericity tests the null hypothesis that the original correlation matrix is an identity matrix. For factor analysis to work some relationships between variables were needed and if the R-matrix were an identity matrix then all correlation coefficients would be zero. Therefore, this test must be significant (i.e. have a significance value less than 0.05). A significant test would indicate that the R-matrix is not an identity matrix; therefore, there are some relationships between the variables the investigator hopes to include in the analysis. For these data, Bartlett's test is highly significant ($p = 0.000$), and therefore factor analysis is appropriate (Field, 2005).

Simple descriptive frequency was used to analyze research question two, the most important management skills international hospitality executives should possess, to determine the means of each variable. The variable with the highest mean was the most important management skill, the second highest was the second most important, the third highest was the third most important until the last most important.

Independent samples t-test was used to analyze the effectiveness of the cross-cultural training activities that was provided by the parent company. This particular type of t-test was used to compare the means of one variable for two groups of cases (Gay & Airasian, 2003). The test variable was the effectiveness of training and the

grouping variables were the cross cultural training activities. In this case, the means would determine whether the cross-cultural training activities provided by the parent company were effective. It is imperative that the investigator should understand the assumption underlying the use of t test before scrutinizing the details of how to perform and interpret a t test. It was assumed that the data has been derived from a population with normal distribution and equal variance. With moderate violation of the assumption, one can still proceed to use the t test provided the following is adhered to: (1) the samples are not too small; (2) the samples so not contain outliers; (3) the samples are of equal or nearly equal size.

In the interpretation of the t statistics, its p-value should be looked at. Generally, there are three situations where the p-value need to be interpreted: (1) If the p-value is greater than 0.05, the null hypothesis is accepted and the result is not significant; (2) If the p-value is less than 0.05 but greater than 0.01, the null hypothesis is rejected and the result is significant beyond the 5 percent level; (3) If the p-value is smaller than 0.01, the null hypothesis is rejected and the result is significant beyond the 1 percent level (Gay & Airasian, 2003). For this particular study, the level of significance was set to $p \leq .05$.

One-way analysis of variance (ANOVA) was used to determine if there was a difference on the management skills of hospitality expatriate executives considering their country of origin. The One-Way ANOVA compares the mean of one or more groups based on one independent variable or factor (Churchill & Brown, 2004). Some assumptions of ANOVA: The dependent variable(s) is normally distributed; the two

groups have approximately equal variance on the dependent variable. The equal variance assumption is determined by Levene's Test. To analyze using SPSS, go to Analyze, choose Compare means, choose One-Way ANOVA. Move all dependent variables into the box labeled "Dependent List", and move the independent variable into the box labeled "Factor". Click on the button labeled "Options", and check off the boxes for appropriate post hoc comparison (Miller, 2003).

The independent variable (IV) was the country of origin and the dependent variables (DV) were the management skills. The management skills variables include: grasps on how all the parts of the organization fit together; has the mental capacity to understand the overall workings of the organization and its environment; international negotiation skills; get along with subordinates, peers, and those at higher levels of the organization; views the organization in a holistic manner; understanding international marketing; understanding international finance; ability to work in international teams; effectively receive ideas and information from others; and effectively convey ideas and information to others.

One-way analysis of variance (ANOVA) was used to determine if there was a relationship between management skills of hospitality expatriate executives and location of the parent company. The One-Way ANOVA compares the mean of one or more groups based on one independent variable or factor (Churchill & Brown, 2004). Some assumptions of ANOVA: The dependent variable(s) is normally distributed; the two groups have approximately equal variance on the dependent variable. The equal variance assumption is determined by Levene's Test. To analyze using SPSS, go to

Analyze, choose Compare means, choose One-Way ANOVA. Move all dependent variables into the box labeled "Dependent List", and move the independent variable into the box labeled "Factor". Click on the button labeled "Options", and check off the boxes for appropriate post hoc comparison (Miller, 2003).

One-way analysis of variance was used to determine if there is a difference on the management skills of hospitality expatriate executives considering the location of the parent company. The factor or independent variable (IV) was location of the parent company and the dependent variables (DV) were the following management skills: grasps on how all the parts of the organization fit together; has the mental capacity to understand the overall workings of the organization and its environment; international negotiation skills; get along with subordinates, peers, and those at higher levels of the organization; views the organization in a holistic manner; understanding international marketing; understanding international finance; ability to work in international teams; effectively receive ideas and information from others; and effectively convey ideas and information to others.

CHAPTER IV

FINDINGS

The purpose of this study was to develop a model to prepare hospitality

expatriate executives for their assignment to their host countries. Specifically the study

would: (1) Establish a model for a successful hospitality expatriate executives' overseas

assignment; (2) Determine the important management skills of successful expatriate

executives; (3) Determine cross-cultural training activities that were provided for

hospitality expatriate executives; (4) Determine whether the expatriate executives'

management skills vary by country of origin; and (5) Examine whether the expatriate

executives' management skills vary according to the location of the parent company.

Background of the Respondents

Simple descriptive statistics were used to determine the respondents'

demographic and professional background. Table 1 showed the demographic

information of the respondents. This revealed that the respondents' age varied widely.

Nine percent were between 20 to 30 years old; twenty-seven percent were between 31

to 40 years; twenty-one percent were between the ages of 41 to 50 years old; thirty

percent (30%) were between the ages of 51 to 60 years old and eleven percent (11%) of

these executives was from 61 years old and above. Most (73%) of the respondents were

male and twenty four (24%) were female. An overwhelming sixty one (61%) of the respondents was married; twenty seven percent (27%) were never married; three percent (3%) were widowed; and nine percent (9%) did not provide an answer.

In terms of the highest educational level obtained or achieved, three percent (3%) had attended on some college; six percent (6%) obtained a college degree particularly hospitality undergraduate degree; twelve percent (12%) achieved a college degree or other undergraduate degrees; three percent (3%) acquired some graduate school; a vast fifty five percent (55%) obtained a graduate school degree; six percent (6%) had other degrees and eight percent (8%) had no answer.

Table 1. Frequency Distribution of the Demographic Information of the Respondents

Variables	Mean	Frequency	Percent
Age Group	4.15		
20-30 years old		6	9.1
31-40 years old		18	27.3
41-50 years old		14	21.2
51-60 years old		20	30.3
61 years old and above		7	10.6
No Answer		1	1.5
Gender	1.75		
Female		16	24.2
Male		48	72.7
No Answer		2	3.0
Current marital status	1.70		
Married		40	60.6
Never been married		18	27.3
Widowed		2	3.0
No Answer		6	9.1
Highest educational level obtained/achieved	5.45		
Some College		2	3.0
College Degree (hospitality undergraduate degree)		4	6.1
College Degree (other undergraduate degrees)		8	12.1
Some Graduate School		2	3.0
Graduate School Degree		36	54.5
Other		6	9.1
No Answer		8	12.1

Note: n = 66

Ninety-seven percent of the respondents had prior overseas experience or they had experience working outside of their home countries. Only 3% did not provide an answer. The number of months the respondents worked as an expatriate executive in the host country varied. Sixteen percent (16%) worked for less than six months; eight percent (8%) worked for 7 to 12 months; another eight percent (8%) worked for 13 to 14 months; ten percent (10%) worked for 25 to 36 months; none of the respondents worked between the 37 to 48 months; eight percent worked for 49 to 60 months; another eight percent worked for 61 months and beyond; and eight percent did not provide any answer regarding the number of months they worked as expatriates.

Regarding the job title, two percent (2%) of the respondents served as consultant, twenty seven percent (27%) were directors or managers, five percent were educators and twenty eight percent (28%) were top executives. In terms of the number of months of hospitality experience the respondents had, seven percent (7%) just worked for less than six months; five percent (5%) worked at most twenty four months; six percent (6%) worked in the industry between 25 to 36 months; three percent (3%) were in the hospitality industry for four years (37–48 months); six percent (6%) were involved in the hospitality industry for sixty months and below; and an overwhelming 73% of the respondents had been with the hospitality industry for more than sixty one months.

These respondents had worked in different departments of the hospitality industry. Six percent (6%) were assigned in the personnel department; nine percent were detailed in marketing or sales; twelve percent (12%) were responsible of the food

and beverage department; fifteen percent (15%) were delegated in the general management area; few (6%) were appointed in the front office; and some (8%) were delegated for financial control. The largest percentage (22%) of the respondents served in other departments of their property which included human resources, training, event management, and research and development. The information on other departments was provided by the respondents in an open-ended question, *question number 11 other*.

The respondents worked in different hotel categories. Six percent (6%) were in a mid priced property; twenty one percent (21%) managed a boutique hotel and thirty nine percent (39%) worked in a luxury hotel property. One third (33%) of the respondents did not indicate the category of the property where they worked.

The level of the self-reported success of the respondents' overseas experience differed. For this particular question, four scales were used: 1= not successful, 2= somewhat successful, 3=successful and 4=extremely successful. Three percent (3%) were not successful; fifteen percent (15%) were somewhat successful; forty six percent (46%) were successful and twenty four percent (24) were extremely successful. In general, the expatriate executives indicated that they viewed themselves as being successful in their assignments to the host country (mean=3.03, successful). Table 1 provided a complete frequency distribution of this background information.

Table 2. Frequency Distribution of the Professional Background of the Respondents

Variables	Mean	Frequency	Percent
Overseas experience prior to present job	2.00		
Yes		64	97.0
Missing/No Answer		2	3.0
Number of months as an expatriate executive in the host country	3.45		
Less than 6 months		16	24.2
7-12 months		8	12.1
13-24 months		8	12.1
25-36 months		10	15.2
37-48 months		0	0.0
49-60 months		8	12.1
61 months and above		8	12.1
Missing/No Answer		8	12.1
Job Title	2.95		
Consultant		2	3.0
Director/Manager		27	40.9
Educator		5	7.6
Top Executive		28	42.4
Number of months of hospitality experience	6.06		
Less than 6 months		5	7.6
13-24 months		3	4.5
25-36 months		4	6.1
37-48 months		2	3.0
49-60 months		4	6.1
61 months and above		48	72.7
Department in which the respondents worked/are working	5.58		
Personnel		4	6.1
Marketing/Sales		6	9.1
Food & Beverages		8	12.1
General Management		10	15.2
Front Office		4	6.1
Financial Control		8	12.1
Other		22	33.3
Hotel category	3.50		
Mid priced Hotel		4	6.1
Boutique Hotel		14	21.2
Luxury Hotel		26	39.4
No Answer		22	33.3
Level of success as an expatriate executive	3.03		
Not Successful		2	3.0
Somewhat Successful		10	15.2
Successful		30	45.5
Extremely Successful		16	24.2
No Answer		8	12.1

Note: n = 66

Research Question One: What are the components of a model for a successful

hospitality expatriate executives' overseas assignment?

Descriptives statistics indicated that the hospitality executives possessed

common attributes "to a moderate extent" through "to a great extent." Five scales were

used for these specific questions where, *1 stands for not at all, 2 to a least extent, 3 to*

a moderate extent, 4 to a major extent and 5 to a great extent. The mean for each item

indicated the extent to which the hospitality expatriate executives possessed these

attributes. The respondents reported the following means for these common attributes:

- Have technical and managerial expertise, mean=4.39;

- Understand a variety of foreign business systems, mean=3.32;

- Coordinate the budgeting process between foreign operational headquarters,

  mean=2.87;

- Resilient, resourceful, optimistic, and energetic, mean=4.52;

- Honesty and integrity, mean=4.77;

- Emotional stability, mean=4.35;

- Adaptability to new environment settings, mean=4.42;

- Stable personal life, mean=4.42;

- Ability to acknowledge, balance, and work with cultural differences,

  mean=4.45;

- Orientation towards time, mean=4.19;

- Demonstrate cultural empathy, mean=4.26;

- Able to deal with complexity, mean=4.39;

- Technically competent, mean=4.1;

- Open-minded and flexible in thought and tactics, mean=4.42;

- Ability to understand why foreigners behave the way they do, mean=4.00;

- Awareness of own cultural background, mean=4.39;

- Cultural interest and sensitivity, mean=4.26;

- Language skills, mean=3.26;

- Effectively conveys ideas and information to others, mean=4.29;

- Effectively receive ideas and information from others, mean=4.29;

- Understanding international finance, mean=3.13;

- International negotiation skills, mean=3.39;

- Understanding international marketing, mean=3.32;

- Ability to work in international teams, mean=4.03;

- Get along with subordinates, peers, and those at higher levels of the organization, mean=4.39;

- Have the mental capacity to understand the overall workings of the organization and its environment, mean=4.42;

- Grasp on how all the parts of the organization fit together, mean 4.42; and

- View the organization in a holistic manner, mean=4.32.

Table 3 provided a comprehensive report of the communalities before and after extraction. Principal component analysis works on the initial assumption that all variance is common; therefore, before extraction the communalities are all 1. The communalities in the column labeled Extraction reflect the common variance in the data structure. For example, it can be articulated that 52.2% of the variance associated with question 1 is common, or shared variance. The amount of variance in each variable that

can be explained by the retained factors is represented by the communalities after extraction (Field, 2005).

According to Field (2005), exploratory factor analysis is an exploratory tool and so it should be used to guide the researcher to make various decisions, not leave the computer to make them. One important decision is the number of factors to extract. During the initial analysis SPSS extracted four factors by default as based on Kaiser's criterion. Most of the variables loaded on factor 1, then factor 2 and factor 3. There was only one loading under factor 4, the question: Orientation towards time. This item loaded on both factor 1 and factor 4. The eigenvectors of this item were .575 and .616 respectively. Since the eigenvectors were very close to each other, the researcher decided to rerun the analysis and specify the number of factors to be extracted for the reason that the item was related to the other items that loaded on a particular factor and also based on the exploratory nature of factor analysis.

Varimax rotation was used for the factor rotation because it is assumed that the factors or components are orthogonal which means that they are not correlated. The rotated component matrix, also called the rotated factor matrix in factor analysis, which is a matrix of the factor loadings for each variable onto each factor. There are several things to consider about the format for this matrix. First, factor loadings less than 0.4 have not been displayed because the investigator asked that these loadings be suppressed. Second, the variable labels are allowed to be printed to aid interpretation. The suppression of loadings less than 0.4 makes interpretation considerably easier, because scanning the matrix to identify substantive loadings is avoided.

The factor loadings are determined by their bold font. Factor 1 has the following loadings: Effectively receive ideas and information from others, .863; Ability to acknowledge, balance, and work with cultural differences, .845; View the organization in a holistic manner, .820; Effectively conveys ideas and information to others, .760; Orientation towards time, .743; Grasp on how all the parts of the organization fit together, .711; Open-minded and flexible in thought and tactics, .696; Have the mental capacity to understand the overall workings of the organization and its environment, .680; Able to deal with complexity, .671; Awareness of own cultural background, .649; Ability to understand why foreigners behave the way they do, .608; Get along with subordinates, peers, and those at higher levels of the organization, .599; Have technical and managerial expertise, .595; Cultural interest and sensitivity, .594; Demonstrate cultural empathy, .577; Technically competent, .451.

Factor 2 had the following loadings: Understanding international marketing, .881; International negotiation skills, .878; Coordinate the budgeting process between foreign operational headquarters, .869; Understanding international finance, .861; Understand a variety of foreign business systems, .855; Ability to work in international teams, .663; Language skills, .611. And Factor 3 has the following loadings: Stable personal life, .774; Resilient, resourceful, optimistic, and energetic, .772; Emotional stability, .713; Honesty and integrity, .665; Adaptability to new environment settings, .586.

Table 3. Exploratory Factor Analysis of a Model for a Successful Hospitality Expatriate

Assignment

Variables	Descriptive Statistics			Communalities		Rotated Component		
	Mean	Std. Dev.	Analysis N	Initial	Extraction	1	2	3
Have technical and managerial expertise	4.39	0.837	62	1	0.522	**0.595**		
Understand a variety of foreign business systems	3.32	1.098	62	1	0.787		**0.855**	
Coordinate the budgeting process between foreign operational headquarters	2.87	1.397	62	1	0.791		**0.869**	
Resilient, resourceful, optimistic, and energetic	4.52	0.718	62	1	0.850	0.502		**0.772**
Honesty and integrity	4.77	0.612	62	1	0.750	0.555		**0.665**
Emotional stability	4.35	0.704	62	1	0.649			**0.713**
Adaptability to new environment settings	4.42	0.879	62	1	0.686	0.477		**0.586**
Stable personal life	4.42	0.879	62	1	0.633			**0.774**
Ability to acknowledge, balance, and work with cultural differences	4.45	0.843	62	1	0.829	**0.845**		
Orientation towards time	4.19	0.827	62	1	0.592	**0.743**		
Demonstrate cultural empathy	4.26	0.922	62	1	0.738	**0.577**		0.527
Able to deal with complexity	4.39	0.71	62	1	0.772	**0.671**		0.529
Technically competent	4.1	0.783	62	1	0.442	**0.451**		
Open-minded and flexible in thought and tactics	4.42	0.759	62	1	0.703	**0.696**		0.421
Ability to understand why foreigners behave the way they do	4.00	0.992	62	1	0.734	**0.608**	0.597	
Awareness of own cultural background	4.39	0.837	62	1	0.654	**0.649**		
Cultural interest and sensitivity	4.26	0.886	62	1	0.725	**0.594**		0.464
Language skills	3.26	1.28	62	1	0.435		**0.611**	
Effectively conveys ideas and information to others	4.29	0.776	62	1	0.689	**0.760**		
Effectively receive ideas and information from others	4.29	0.733	62	1	0.840	**0.863**		
Understanding international finance	3.13	1.194	62	1	0.787		**0.861**	
International negotiation skills	3.39	1.298	62	1	0.841		**0.878**	
Understanding international marketing	3.32	1.212	62	1	0.854		**0.881**	
Ability to work in international teams	4.03	1.008	62	1	0.757		**0.663**	0.555
Get along with subordinates, peers, and those at higher levels of the organization	4.39	0.754	62	1	0.736	**0.599**		0.576
Have the mental capacity to understand the overall workings of the organization and its environment	4.42	0.714	62	1	0.764	**0.680**		0.518
Grasp on how all the parts of the organization fit together	4.42	0.759	62	1	0.722	**0.711**		0.449
View the organization in a holistic manner	4.32	0.864	62	1	0.790	**0.820**		

Extraction Method: Principal Component Analysis
Rotation: Varimax with Kaiser Normalization
Option: Suppress absolute value less than .40

The eigenvalues associated with each factor represent the variance explained by that particular linear component and SPSS also displays the eigenvalue in terms of the percentage of variance explained (so, factor 1 explains 52.74% of total variance). It should be clear that the first few factors explain relatively large amounts of variance (especially factor 1) whereas subsequent factors explain only small amounts of variance. SPSS then extracts all factors with eigenvalues greater than 1, which leaves three factors. The eigenvalues associated with these factors are again displayed (and the percentage of variance explained) in the columns labeled Extraction Sums of Squared Loadings. The values in this part of the table are the same as the values before extraction, except that the values for the discarded factors are ignored (hence, the table is blank after the third factor). In the final part of the table (labeled Rotation Sums of Squared Loadings), the eigenvalues of the factors after rotation are displayed. Rotation has the effect of optimizing the factor structure and one consequence for these data is that the relative importance of the three factors is equalized (Field, 2005). Before rotation, factor 1 accounted for considerably more variance than the remaining two (52.742% compared to 14.055%, 4.888%), however after extraction it accounted for only 31% of variance compared to 22% and 19%, respectively. Table 4 listed the eigenvalues associated with each linear component (factor) before extraction, after extraction and after rotation. Before extraction, SPSS identified 28 linear components within the data set.

Table 4. Total Variance Explained for the Factors of a Successful Hospitality Expatriate Assignment

Total Variance Explained	Component		
	1	2	3
Initial Eigenvalues			
Total	14.768	52.742	52.742
% of Variance	3.935	14.055	66.797
Cumulative %	1.369	4.888	71.685
Extraction Sums of Squared Loadings			
Total	14.768	52.742	52.742
% of Variance	3.935	14.055	66.797
Cumulative %	1.369	4.888	71.685
Rotation Sums of Squared Loadings			
Total	8.735	31.197	31.197
% of Variance	6.027	21.526	52.723
Cumulative %	5.309	18.962	71.685

Extraction Method: Principal Component Analysis

Interpretation

The questions that load highly on factor 1 seem to all relate to different aspects of a person's competencies:

- View the organization in a holistic manner;

- Ability to acknowledge, balance, and work with cultural differences;

- Effectively receive ideas and information from others;

- Grasp on how all the parts of the organization fit together;

- Have the mental capacity to understand the overall workings of the organization and its environment;

- Awareness of own cultural background;

- Effectively conveys ideas and information to others;

- Get along with subordinates, peers, and those at higher levels of the organization;

- Open-minded and flexible in thought and tactics;

- Ability to understand why foreigners behave the way they do;

- Able to deal with complexity; Have technical and managerial expertise;

- Cultural interest and sensitivity;

- Demonstrate cultural empathy; and

- Orientation towards time.

Therefore this factor was renamed, *personal competencies*.

The questions that load highly on factor 2 all seem to relate to different aspects of global management such as:

- Understanding international marketing;

- International negotiation skills;

- Coordinate the budgeting process between foreign operational headquarters;

- Understand a variety of foreign business systems;

- Understanding international finance;

- Ability to work in international teams; and

- Language skills.

Therefore, this factor was renamed, *global management skills*.

Finally, the questions that load highly on factor 3 all contain some attributes of expatriate assignment:

- Emotional stability;

- Stable personal life;

- Resilient, resourceful, optimistic, and energetic;

- Adaptability to new environment settings; and

- Honesty and integrity.

Therefore, this factor was renamed, *expatriate adjustment*. This analysis seems to reveal that the initial questionnaire, in reality, was composed of three sub-scales: personal competencies, global management skills, and expatriate adjustment. Please refer to figure 1.

Figure 1 showed that the straight lines connecting the factors to the variables indicated that these variables were loaded onto that factor. The curve lines that connect

the variables indicated that the variables correlate. There are no curve lines that connect

the three factors because they are assumed to be orthogonal or not correlated.

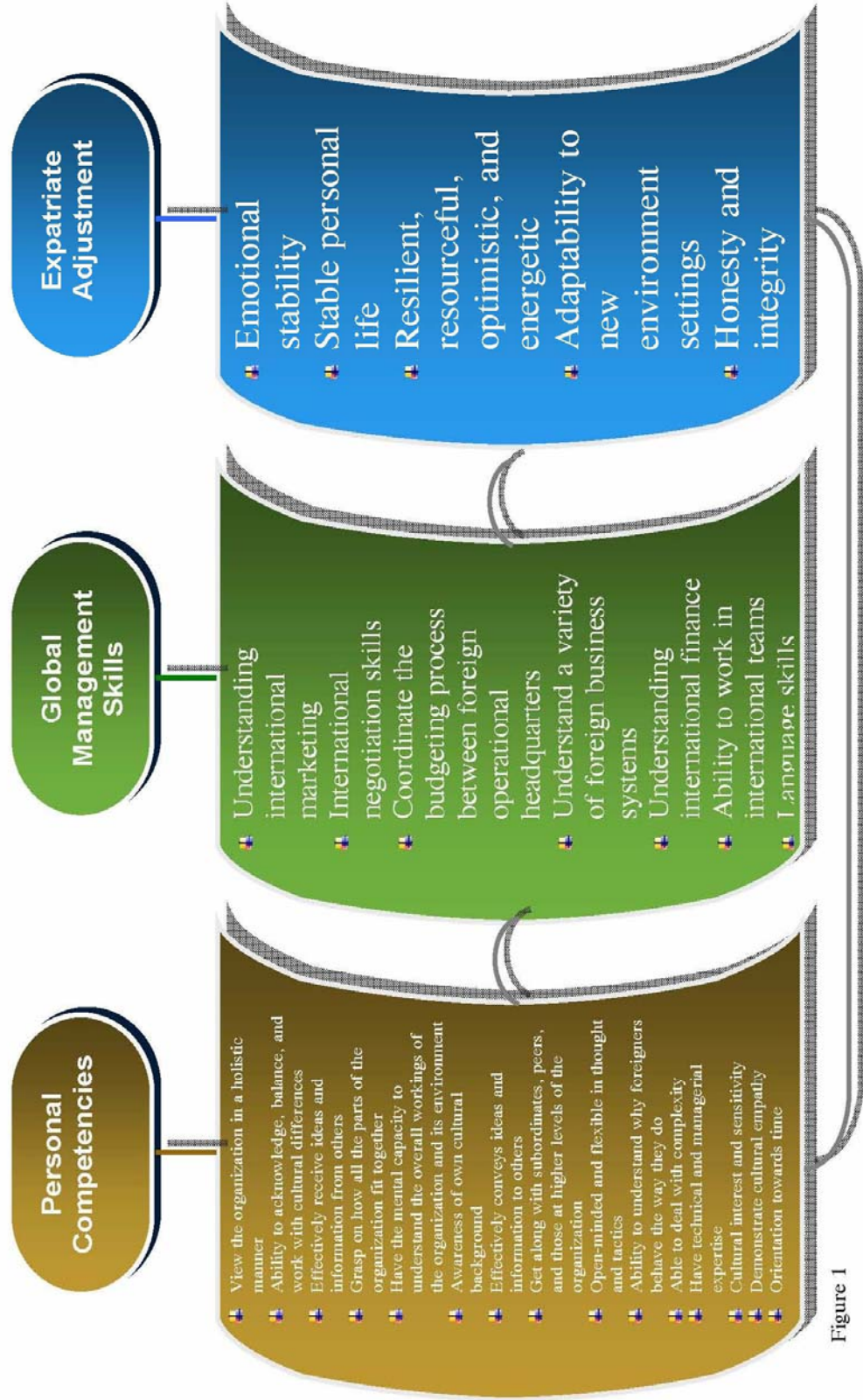**A Model For a Successful Hospitality Expatriate Assignment**

Expatriate Adjustment

- Emotional stability
- Stable personal life
- Resilient, resourceful, optimistic, and energetic
- Adaptability to new environment settings
- Honesty and integrity

Global Management Skills

- Understanding international marketing
- International negotiation skills
- Coordinate the budgeting process between foreign operational headquarters
- Understand a variety of foreign business systems
- Understanding international finance
- Ability to work in international teams
- Language skills

Personal Competencies

- View the organization in a holistic manner
- Ability to acknowledge, balance, and work with cultural differences
- Effectively receive ideas and information from others
- Grasp on how all the parts of the organization fit together
- Have the mental capacity to understand the overall workings of the organization and its environment
- Awareness of own cultural background
- Effectively conveys ideas and information to others
- Get along with subordinates, peers, and those at higher levels of the organization
- Open-minded and flexible in thought and tactics
- Ability to understand why foreigners behave the way they do
- Able to deal with complexity
- Have technical and managerial expertise
- Cultural interest and sensitivity
- Demonstrate cultural empathy
- Orientation towards time

Figure 1

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Research Question Two: What are the most important management skills international hospitality executives should possess?

Respondents indicated that there were important management skills hospitality expatriate executives should possess. These were listed in Table 5. The variable with the highest to lowest means were as follows:

- grasps on how all the parts of the organization fit together (mean=3.59);

- has the mental capacity to understand the overall workings of the organization and its environment (mean=3.58);

- international negotiation skills (mean=3.44);

- get along with subordinates, peers, and those at higher levels of the organization (mean=3.32);

- views the organization in a holistic manner (mean=3.30);

- understanding international marketing (mean=3.26);

- understanding international finance (mean=3.24);

- ability to work in international teams (mean=3.19);

- effectively receive ideas and information from others (mean=3.15); and

- effectively convey ideas and information to others (mean=3.10).

Table 5. Descriptives Frequency Distribution of the Most Important Management

Skills that Hospitality Expatriate Executives should Possessed

Variables	Frequency	Mean	Standard Deviation
Grasps on how all the parts of the organization fit together	44	3.59	1.386
Has the mental capacity to understand the overall workings of the organization and its environment	52	3.58	1.513
International negotiation skills	36	3.44	1.362
Get along with subordinates, peers, and those at higher levels of the organization	56	3.32	1.574
Views the organization in a holistic manner	40	3.30	1.604
Understanding international marketing	38	3.26	1.349
Understanding international finance	34	3.24	1.362
Ability to work in international teams	54	3.19	1.555
Effectively receive ideas and information from others	52	3.15	1.500
Effectively convey ideas and information to others	58	3.10	1.575

Note: n=66

Research Question Three: What cross-cultural training activities that the parent company provided were most effective for the success of an expatriate assignment?

The effectiveness of the cross-cultural training activities is the test variable or the dependent variable. The grouping variable or the independent variables are the cross cultural training activities listed: cross-cultural sensitivity training, cross-cultural team building, cross-cultural management, cross-cultural negotiation, cultural diversity training, cross cultural relocation, youth cross-cultural training, business & culture, and business etiquette. The dependent variable which is effectiveness of the training program provided by the parent company had a four point scale, 1 for not effective; 2 for moderately effective, 3 for effective and 4 for extremely effective. Table 6 showed the Independent Samples Tests of the effectiveness of the cross-cultural training activities provided by the parent company. The first column of the table 6 showed the test variable which is effectiveness of the cross-cultural training activities provided by the parent company. The cross-cultural training activities and its means were listed in the second and third columns, respectively.

One of the assumptions underlying the use of t test is the equality of variance which is indicated by the Levene test for homogeneity (equality) of variance. The Levene statistic is included in the table. In order to satisfy the homogeneity of variance assumption, the F value of the Levene test should be greater than the 0.05 ($p > 0.05$) significance level set by the investigator. The F values of the following independent variables denote that the variance can be assumed to be homogeneous and the Equal Variance line values for the t test be used:

- cross-cultural team building, F=0.597 ($p=0.443$);

- cross-cultural management, F=0.989 (*p=0.325*);

- cross-cultural negotiation, F=0.024 (*p=0.878*);

- cross cultural relocation, F=0.895 (*p=0.349*);

- youth cross-cultural training, F=0.095 (*p=0.760*);

- business & culture, F=0.019 (*p=0.890*); and

- business etiquette, F=0.597 (*p=0.443*).

The F values of cross-cultural sensitivity training, F=9.123 and cultural diversity training, F=5.818 indicated unequal variance. The t value is considered significant if it is greater than t=±2.00 (Keppel, 2004). The t values of the variables in the table indicated that the cross-cultural training activities provided by the parent company were significant: cross-cultural team building, t=3.241 (*p=0.002*); cross-cultural management, t=3.352 (*p=0.002*); cross-cultural negotiation, t=3.639 (*p=0.001*); cross cultural relocation, t=2.754 (*p=0.008*); youth cross-cultural training, t=4.498 (*p=0.000*); business & culture, t=5.086 (*p=0.000*); and business etiquette, t=3.241 (*p=0.002*). For cross-cultural sensitivity training and cultural diversity training, their t values were, 1.827 and .487, respectively which indicated that these cross cultural training activities were not effective.

In summary, out of nine cross-cultural training activities provided by the parent company seven cross-cultural training activities were significantly effective and two cross-cultural training activities were not effective. The seven cross-cultural training activities provided by the company that were effective were: cross-cultural team building (mean=2.88); cross-cultural management (mean=2.84); cross-cultural negotiation (mean=3.11); cross cultural relocation (mean=2.82); youth cross-cultural

training (mean=3.25); business & culture (mean=2.89); and business etiquette

(mean=2.71). And the two cross-cultural training activities that were not effective

were: cross-cultural sensitivity training (mean=2.83) and cultural diversity training

(mean=2.67).

Table 6. Independent Samples Tests of the Effectiveness of the Cross-Cultural Training

Activities Provided by the Parent Company

Test Variable (Dependent Variable)	Grouping Variable (Independent Variable)	Mean	Levene Statistic	t	Sig.
Effectiveness of the cross-cultural training activities provided by the parent company	Cross-cultural sensitivity training	2.83	9.213	1.827	0.074
	Cross-cultural team building	2.88	0.597	3.241	*0.002
	Cross-cultural management	2.84	0.989	3.352	*0.002
	Cross-cultural negotiation	3.11	0.024	3.639	*0.001
	Cultural diversity training	2.67	5.818	.487	0.628
	Cross cultural relocation	2.82	0.895	2.754	*0.008
	Youth cross cultural training	3.25	0.095	4.498	*0.000
	Business & Culture	2.89	0.019	5.086	*0.000
	Business Etiquette	2.71	0.597	3.241	*0.002

denotes significance at p < .05

Research Question Four: Do the required management skills vary by the respondents' country of origin?

The Levene's test of homogeneity of variance is computed by SPSS to test the ANOVA assumption that each group (category) of the independent variable has the same variance. If the Levene statistic is significant at the .05 level or better, the researcher rejects the null hypothesis that the groups have equal variance. Because the Levene statistic is significant at the .05 level in this case, the researcher concludes that the groups formed by the country of origin are not homogeneous in variances, violating an assumption of ANOVA. However, according to Keppel (2004), failure to meet the assumption of homogeneity of variance is not fatal to ANOVA, which is relatively robust, particularly when groups are of equal sample size.

The "Sig" column gives the probability (p) value of the F test. Since the p value is very highly significant, the researcher concludes that management skills did vary by the respondents' country of origin. The F test indicates that country of origin is significantly related to effectively convey ideas and information to others due to difference in the mean and variance of effectively convey ideas and information to others in the twelve categories of country of origin. However, it did not show the structural differences among the twelve categories. This is revealed by pairwise multiple comparisons. To get the pairwise comparisons, post hoc tests should be conducted for the variables that were statistically significant.

For this study the variables that were statistically significant were: understanding international marketing (p=0.038); ability to work in international teams (p=0.027); grasps on how all the parts of the organization fit together

(p=0.045); and views the organization in a holistic manner (p=0.004). Note, however, that post hoc tests were not performed for the following significant variables: Understanding international marketing; Ability to work in international teams; Grasps on how all the parts of the organization fit together; and Views the organization in a holistic manner because at least one group has fewer than two cases.

Table 7. One Way Analysis of Variance of the Relationship between Management

Skills and Country of Origin

Dependent Variables (Management Skills)	Levene Statistic	F	Sig.
Effectively convey ideas and information to others	5.880	1.133	.386
Effectively receive ideas and information from others	6.124	1.246	.330
Understanding international finance	5.922	2.400	.064
International negotiation skills	2.558	1.970	.117
Understanding international marketing	3.423	2.784	*.038
Ability to work in international teams	5.204	3.051	*.027
Get along with subordinates, peers, and those at higher levels of the organization	4.439	2.193	.085
Has the mental capacity to understand the overall workings of the organization and its environment	3.638	2.389	.065
Grasps on how all the parts of the organization fit together	3.638	2.650	*.045
Views the organization in a holistic manner	4.085	4.753	*.004
Factor or Independent Variable: Country of Origin (Australia, Canada, China, India, Korea, Malaysia, Switzerland, Taiwan, Thailand, Turkey, United Kingdom and United States)			

*denotes significance at $p < .05$; $n = 66$

Research Question Five: Do the hospitality expatriates' management skills vary according to the location of the parent company?

One-way analysis of variance was used to examine the relationship between the following management skills (dependent variables): effectively convey ideas and information to others, effectively receive ideas and information from others, understanding international finance, international negotiation skills, understanding international marketing, ability to work in international teams, get along with subordinates, peers, and those at higher levels of the organization, has the mental capacity to understand the overall workings of the organization and its environment, grasps on how all the parts of the organization fit together, views the organization in a holistic manner and the factor or independent variable, location of the parent company.

The Levene's test of homogeneity of variance is computed by SPSS to test the ANOVA assumption that each group (category) of the independent variable has the same variance. If the Levene statistic is significant at the .05 level or better, the researcher rejects the null hypothesis that the groups have equal variances. Because the Levene statistics are significant at the .05 level in this case, the researcher concludes that the groups formed by the location of the parent company are not homogeneous in variances, violating an assumption of ANOVA. Note, however, that failure to meet the assumption of homogeneity of variances is not fatal to ANOVA, which is relatively robust, particularly when groups are of equal sample size (Keppel, 2004).

The "Sig" column gives the probability (p) value of the F test. Since the p value is very highly significant for four dependent variables (management skills), the researcher concludes that understanding international finance (p=.000), international

negotiation skills (p=.002), has the mental capacity to understand the overall workings of the organization and its environment (p=.027), and grasps on how all the parts of the organization fit together (p=.018) vary by the respondents' location of the parent company. The F test indicates that location of the parent company is significantly related to the dependent variables mentioned above. Therefore, there is a significant difference between Australian, Chinese, Indian, Middle Eastern, Switzerland, Thailand and United States parent company's location on their level of: understanding international finance, international negotiation skills, understand the overall workings of the organization and its environment and how all the parts of the organization fit together.

This significant relationship was due to difference in the mean and variance of understanding international finance, international negotiation skills, mental capacity to understand the overall workings of the organization and its environment, and grasps on how all the parts of the organization fit together in the seven categories of location of the parent company. However, ANOVA did not show the structural differences among these categories. The structural difference was revealed by pairwise multiple comparisons. To obtain the pairwise multiple comparisons, post hoc tests were conducted. Note, however that post hoc test was only conducted for the variables that were statistically significant. Tukey's HSD (Honestly Significantly Different) was the post hoc test used to determine which category of the location of the parent company was significant. The Tukey's HSD multiple comparisons revealed that on the variable, understanding international finance, Australia, China, India, Middle East, Switzerland, Thailand and the United States were significantly different from each other. And the

variable international negotiation skills, Switzerland is significantly different from China, India, and the Middle East.

Table 8. One Way Analysis of Variance of the Relationship between Management

Skills and Location of the Parent Company

Dependent Variables (Management Skills)	Levene Statistic	F	Sig.
Effectively convey ideas and information to others	5.880	1.612	.198
Effectively receive ideas and information from others	6.124	2.409	.067
Understanding international finance	5.922	23.264	*.000
International negotiation skills	2.558	5.629	*.002
Understanding international marketing	3.423	2.214	.087
Ability to work in international teams	5.204	2.273	.080
Get along with subordinates, peers, and those at higher levels of the organization	4.439	2.441	.064
Has the mental capacity to understand the overall workings of the organization and its environment	3.638	3.103	*.027
Grasps on how all the parts of the organization fit together	3.638	3.433	*.018
Views the organization in a holistic manner	4.085	2.575	.054
Factor or Independent Variable: Location of Parent Company (Australia, China, India, Middle East, Switzerland, Thailand and United States).			

* denotes significance at $p \leq .05$

CHAPTER V

CONCLUSION AND RECOMMENDATION

The purpose of this study was to establish a model for a successful hospitality expatriate executive's overseas assignment, determine the important management skills of successful expatriate executives, determine the effectiveness of cross-cultural training activities that were provided for hospitality executives, determine whether the expatriate executives' management skills vary by country of origin, and examine whether the expatriate executives' management skills vary according to the location of the parent company. In addition, the results revealed the work experience and demographic profile of these hospitality expatriate executives. This chapter is presented in two sections: a conclusions section and a recommendations section.

Conclusions

Background and Demographics

Senior-level executives and non-senior level managers that had experienced working at least once in their careers outside of their home country were included in this study. Respondents' email addresses were selected from the online directory of the International Hotel and Restaurant Association (IHRA). The majority of the respondents were between the ages of 51 to 60 years old, male, married and highly

educated (most of them had graduate degree). They had prior overseas experience, had worked in the host country for six months and they worked in luxury hotel properties. A high percentage of no answer on the hotel category had been noted.

A reason for this may be that these respondents were consultants of several hotel properties. This is evident on the high education obtained. There was a broad variation in professional backgrounds, years of international experience, and expatriate assignments across the 70 respondents. The participants included in this study derived from a broad spectrum of functional backgrounds including general managers, consultants, Human Resources generalists, marketing managers, training and development specialists, food and beverage directors, front office directors, financial controllers, event managers, and scientists. It seemed that success in international assignments can be obtained through a variety of different career paths and functional disciplines.

Model of a Successful Hospitality Expatriate Assignment

Exploratory factor analysis generated three components of a model for a successful hospitality expatriate assignment. These three components or factors were personal competencies, global management skills, and expatriate adjustment. Personal competencies included the following fifteen traits or variables:

- View the organization in a holistic manner;
- Ability to acknowledge, balance, and work with cultural differences;
- Effectively receive ideas and information from others;

- Grasp on how all the parts of the organization fit together;

- Have the mental capacity to understand the overall workings of the organization and its environment;

- Awareness of own cultural background;

- Effectively conveys ideas and information to others;

- Get along with subordinates, peers, and those at higher levels of the organization;

- Open-minded and flexible in thought and tactics;

- Ability to understand why foreigners behave the way they do;

- Able to deal with complexity;

- Have technical and managerial expertise;

- Cultural interest and sensitivity;

- Demonstrate cultural empathy; and

- Orientation towards time.

The competencies mentioned above are very useful during employee selection process. Before sending an employee abroad, it is imperative to consider all the aspects of this issue. Selection is where it all starts. The success of an expatriate depends first on how well the recruitment process is completed. The overriding key to operating successfully abroad is to select the right person to assign to a particular task (Avril & Magnini, 2007).

What differentiates those who successfully complete their assignments from those who return home early? To answer this question, the resume of the candidate

must first be considered. One factor that can sometimes be portrayed through a resume is communication skills or the ability of the individual to effectively receive ideas and information from others. In addition, the resume can indicate the amount of international experience of the person, and more specifically, if the person has ever worked in the country that is in focus (Avril & Magnin, 2007; Tye & Chen, 2005). It is pertinent to note that the researchers generally consider previous international experience to be of importance to expatriates because foreign work experience typically teaches an individual the ability to generate strategies for adaptation in new situations (Avril & Magnin, 2007; Tye & Chen, 2005). Another aspect that can be identified through the resume is the technical competence of the candidate; the ability to efficiently perform the task that requires specific skills (Avril & Magnini, 2007). The resume is a good starting point in a candidate search and can be useful in screening out unqualified applicants, but the selection process of the expatriate must evidently move beyond the resume. Particular attention must be paid to personal competencies that include the ability to adapt to different norms and modes of behavior, as well as high tolerance for ambiguity (Avril & Magnin, 2007).

The categories of internationally-focused personal competencies identified by successful expatriate executives were consistent with research into success criteria of executives working international positions. The labels assigned to each factor appear descriptive of the factor contents and are reflective of current research into international expatriate executives' success criteria. This suggests that researchers accurately portray the field of international management as a whole. It also suggests

that managers and executives are cognizant of current thinking into the success criteria involved with managing in international settings. These findings paralleled that of the information revealed by Nelson (1999).

Personal competencies appear to break into three overarching categories: personal traits and attitudes; cultural awareness; and, knowledge and skill components. Getting along with subordinates, peers, and those at higher levels of the organization, open-minded and flexible in thought and tactics, and being able to deal with complexity were characteristics determined to stem from the personal traits of an individual. These traits would appear to be somewhat unique to a person's character.

As important as these personal traits appeared, a large proportion of behaviors examined through this study represent cultural awareness and knowledge and skill components that are not rooted in attitude or in personal traits. Cultural awareness includes the ability to understand why foreigners behave the way they do and awareness of own cultural background. It is very important that the executive knows his or her own culture.

Knowledge and skills surrounding a particular position are more readily learned than personal traits and attitudes which suggest that managers and executives holding international positions can quickly develop some level of international savvy such as viewing the organization in a holistic manner (Nelson, 1999; Spencer & Spencer, 1993; Rothwell & Kazanas, 1992).

Global management skills comprised: Understanding international marketing; International negotiation skills; Coordinate the budgeting process between foreign

operational headquarters; Understand a variety of foreign business systems; Understanding international finance; Ability to work in international teams; and Language skills. The first six skills are obviously related to global management skills that expatriate executives should possess. Language skills loaded in this factor. It should be noted that language skills in this study is not the ability to speak other people's native language or dialects. Language skill for this study is the ability of the expatriate to communicate effectively. Being able to communicate effectively with people of all cultures would seem to be a critical skill when involved in international ventures. Perhaps the accountability of such communication is to ensure that one's message has been properly understood within the cultural context of the individual receiving it. It stands to reason that building such skills would take a great deal of experience with foreign cultures. Since language skills is communication skills, naturally, it should be part of management skills. However, the researcher would like to point out that the respondents may have perceived the question as the ability to speak other people's language or dialect which resulted to the question being ambiguous.

Expatriate adjustment contained the following traits: Emotional stability; Stable personal life; Resilient, resourceful, optimistic, and energetic; Adaptability to new environment settings; and Honesty and integrity. It is very important that the expatriate executive has all the traits mentioned above. The role of the family of internationally active executives is vital for the success of expatriates. It would make sense that the heavy travel schedules of American executives working international

positions would require strong family (or friendship) support, the role of the family (stable personal life) was rated as highly by participants in this study. This is similar to Black, Gregersen, & Mendenhall's (1992) research into expatriate success criteria where family dissatisfaction with the expatriate living situation is the number one reason for expatriate failure. This runs contrary to Nelson's (1999) study where family support was not rated highly by the respondents. Indeed, family issues are the number one concern for expatriate managers when taking an assignment and ensuring on the job effectiveness (Nelson, 1999; Adler & Bartholomew, 1992). Many managers choose not to accept an expatriate assignment because of the hardship it may cause to their personal lives and families (Tung, 1987; 1988; 1993). It appears that executives working out of the host countries rely on their family for support and that the role of the family is perceived to be as important to expatriate success.

Managers and executives also should stay well-informed of the internal workings of their organization. Much of strategy formulation and implementation should revolve around making sure that such strategies are possible given the organizational setting. The breadth of information to be tracked and analyzed, thus, appears quite large and would appear to put a great deal of responsibility on high ranking managers to simply stay informed about their company and the world around them (Nelson, 1999).

Behaviors related to cross-cultural issues appear to be very important to expatriate success. The importance of communicating across cultures with great sensitivity and awareness is well documented (Moran & Harris, 1996; Elashmawi &

Harris, 1992). This study confirms that managers working in international positions are very much dependent on a variety of cross cultural knowledge, skills and attitudes to conduct business in an international setting (Nelson, 1999).

Important Management Skills

Respondents indicated that there were important management skills hospitality expatriate executives should possess. These important management skills were:

1. Grasps on how all the parts of the organization fit together;

2. Has the mental capacity to understand the overall workings of the organization and its environment;

3. International negotiation skills;

4. Get along with subordinates, peers, and those at higher levels of the organization;

5. Views the organization in a holistic manner;

6. Understanding international marketing;

7. understanding international finance;

8. Ability to work in international teams;

9. Effectively receive ideas and information from others; and

10. Effectively convey ideas and information to others.

This suggests that expatriate executives should possess these skills in order for them to be successful in international settings or locations.

Cross-cultural Training Activities

Cross-cultural training activities that the parent company provided were most effective for the success of an expatriate assignment: In summary, out of nine cross-cultural training activities provided by the parent company seven cross-cultural training activities were significantly effective and two cross-cultural training activities were not effective. The seven cross-cultural training activities provided by the company that were effective were:

- cross-cultural team building;

- cross-cultural management;

- cross-cultural negotiation;

- cross cultural relocation;

- youth cross-cultural training;

- business & culture; and

- business etiquette.

The two cross-cultural training activities that were ineffective were:

- cross-cultural sensitivity training; and

- cultural diversity training.

The ineffectiveness of these two cross-cultural training activities may have been caused by the inability of the organization to encourage the employees to participate in such training. Another reason could be the content of the training program may not be interesting and interactive. The best thing to do is to immerse the employees on other people's culture for hands-on experience.

For decades, cross cultural researchers have attempted to illustrate to global companies the role cross cultural training plays in facilitating the success of an expatriate (Littrell & Salas, 2005; Black & Mendenhall, 1990; Tung, 1982). In the past global companies ignored the advice of using cross cultural training. Seventy percent of these organizations did not provide their employees with any form of cross cultural training (Littrell & Salas, 2005; Black & Mendenhall, 1990). Once the expatriate is selected, the next step is an effective cross cultural training (CCT) program. CCT is necessary because in the hospitality business there is often great pressure to fill a position, and the perfect candidate who possesses technical competence, experience in the host country, the ideal emotional and family situation, and a high learning orientation is rarely available. Therefore, training helps the expatriate understand the culture of the foreign destination and can further develop their learning orientation (Avril & Magnini, 2007; Porter & Tansky, 1999). Cross-cultural training benefits the expatriate by highlighting the differences that they could face in the foreign land. At the bare minimum, the training must provide the selected expatriate with coaching in the areas of business culture, etiquette, diversity, interpersonal communication, and conflict resolution (Avril & Magnini, 2007).

Management Skills and Country of Origin

Management skills vary by the respondents' country of origin: For this study the variables that were statistically significant were: understanding international marketing; ability to work in international teams; grasps on how all the parts of the

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organization fit together; and views the organization in a holistic manner. This indicates that the ethnicity of an individual influences their management skills. The time is now ripe for considering new approaches to cross-cultural management. Well-known researchers in the field, notably Hofstede (2003), and his followers who undertook a global study on leadership, have developed cultural dimensions and typologies for classifying and differentiating countries across the globe. The functional value of such research efforts tends to get diluted by their extensive global sweep. If countries are indeed culturally distinguishable, can they usually compared against each other? Or are apples being compared to oranges? In other words, countries with high power distance scores can be so different from countries with low power distance scores that managers from the first type may not be able to work in the latter type and vice versa (Jacob, 2005).

There is a second problem associated with global sweep studies. A country with a high power index score comprises individuals who may have low scores as well. The rule may suggest that individuals from that country have high power distance scores. But a larger number of exceptions to that rule may exist. If exceptions to the rule are as numerous as the rule itself, can meaningful predictions based on that rule be made about individual managerial behavior? The answer is likely to be a resounding no (Littrell & Salas, 2007).

What needs to be done is to see the complex interplay between culture and management in terms of a constantly evolving dynamic, because both are constantly evolving. Others work with their emphasis on typologies and dimensions provide us

with a static snapshot of a country's orientation. But how does it help to know that managers in Mexico have high power distance scores? Does it render them unfit to work in Sweden? Can the archetypical Chinese corporation CEO with his long-term orientation, be able to function effectively in a culturally antithetical country like America? The evidence is that he can. In which case, he is not a slave of his own cultural orientation as some typologies would have others believe. The orange is not an orange and the apple is not quite the apple after all (Littrell & Salas, 2007).

Thus cultural boundaries need to be construed as permeable, rather than as walls which differentiate and segregate. Centuries ago, Alexander Pope had cautioned scholars that a little learning was a dangerous thing. To counter the damage that can be wrought by a little learning, researchers today should employ more robust methodology. Such methodology should resort to different approaches done at varying levels of analyses. Extensive individual surveys can be bolstered by organizational surveys, and then reinforces by case-studies. Most cross-cultural studies of note and repute have contended themselves with a single assessment approach.

Since there is no such thing as cultural purity, what needs to be emphasized is that countries have different cultural mixes and people tend to be hybrids who simultaneously hold membership in different cultural groups. Hence, what is of the essence is that hybridization of management practices becomes more widespread. Hybrid management practices explicitly reflect the culturally heterogeneous context of countries. Thus, effective Swiss management practices may actually combine with the

best features of Swiss-French and Swiss-Italian management. The actual combination will depend on the exigencies of the situation (Jacob, 2005).

Management Skills and Location of Parent Company

Management skills vary according to the location of the parent company. This means that there is a difference on the management skills of executives based on the location of the parent company. The researcher concludes that understanding international finance; international negotiation skills; has the mental capacity to understand the overall workings of the organization and its environment; and grasps on how all the parts of the organization fit together vary by the respondents' location of the parent company which means that Australia, China, India, Middle East, Switzerland, Thailand and United States differ on their level of: understanding international finance, international negotiation skills, understand the overall workings of the organization and its environment and how all the parts of the organization fit together. This suggests that parent companies follow their own organizational culture and they want their child companies to adhere to this.

Caveat

Failure in this study is defined as a breakdown or decline in the performance of the hospitality expatriate executive due to the location and culture of the overseas assignment. It has nothing to do with organizational philosophy. It is measured based on the location and culture not on organizational philosophy. These measures could be

premature termination of the assignment, lack of family support and adaptability to new environment. Therefore, managers or executives may fail because of corporate philosophy and it has nothing to do with the location of the assignment.

Recommendations

The model developed in this study would have a great impact to the following entities: hospitality expatriate executives, Human Resource professionals, higher education and researchers. This section is divided into four parts:

Hospitality Expatriate Executives

- Executives and managers should build knowledge and skills in gathering information on international business. Information gathering skills appear to be critical on a variety of levels. At a very basic level all managers and executives should learn how to gather information on the global marketplace. Country-and-market-specific informational gathering skills should also be developed over the course of a career. Managers and executives holding international positions should work on improving cross-cultural skills to improve information gathering and personal interaction skills. Managers should begin to try to develop these skills long before they take an international position, thereby ensuring a maximum potential for success when assigned such a position. Executives, in particular, should focus on being aware of cultural differences that could affect strategy formulation and personal business interactions.

- Executives may wish to consider taking extended business trips in order to foster personal contacts with foreign country managers. Such trips could help to improve strategy formulation on the part of executives, as well as, to

develop cross-cultural and global information gathering skills. Additionally, executives may want to focus on imparting business development strategies to help develop foreign country managers during these extended trips.

- Executives and managers having difficulty progressing in all areas should be provided opportunities for developing the areas they are lacking in. In fact, such opportunities could be provided for managers of all levels to develop a variety of international behaviors. This would help to ensure that a substantial cadre of managers is being developed for future executive level staff positions. In particular, training on gathering global information and implementing international strategy should be provided early in the careers of junior executives and middle managers to ensure that these behaviors are firmly instilled for later access at higher levels. Junior-level executives should also be given opportunities to practice strategy development, as these skills will be required when they reach the senior ranks.

Human Resources Department Professionals

- Human Resource Development professionals should be especially cognizant of identifying personal competencies as the distinguishing elements for selecting such high-potential managers slated for executive positions. One tool that appears to be quite promising in developing international behaviors among managers and executives appears to be taking part in expatriate assignments.

- Opportunities for taking part in expatriate assignments should be provided to all high potential managers to solidify the career background of such individuals. Expatriate experiences appear to be particularly effective in developing some of the personal traits and characteristics required of executives managing in multinational organizations. However, such assignments need to be more systematically implemented by Human Resource Department (HRD) professionals. Indeed, a method for systematically implementing expatriate assignments as a tool for building international competencies for a broad variety of managers needs to be developed. However, HRD professionals should be careful in how they go about offering expatriate assignments to prospective managers.

- The offer of an expatriate assignment could very well be a test for personal and professional flexibility. It should be made clear that expatriate assignments are a mandatory requirement for promotion to the highest levels of multinational organizations. However, the decision to take part in such a developmental experience should not be forced onto prospective managers. Allowing managers to self-select with very little or no pressure could help to screen out individuals who are not as flexible. In this manner, self-selection could serve as a simple, yet effective, screening mechanism. Finally, expatriate experiences should not be unique experiences for those lucky enough to attain in international assignment.

- Expatriate assignments should be a tool for building a core of knowledge or pool of international competencies among the cadre of managers earmarked for promotion to the highest levels of organization. Expatriate assignments could become a programmatic intervention for the development of upper-level managers within the multinational organization. Having international experience would be the norm for promotion into the highest levels of American multinational organizations. Indeed, it could be argued that a system providing opportunities for all managers to obtain international competencies should be developed.

- Managers of all levels should be exposed early in their careers to provide sufficient time to develop as many of the behaviors as possible. This may prove to be impractical in large multinational companies where managerial positions exist that never interface with international operations. However, international competencies such as gathering global intelligence and improving cross-cultural could be developed in all managers. Providing cross-cultural training for all managers in the multinational corporation could be linked to diversity initiatives which have been found to be similar in learning outcomes as cross-cultural training interventions (Nelson, 1999; Wentling & Palma-Rivas, 1997). Such cross-cultural learning experiences should be provided early in a manager's career so that these critical behaviors are firmly instilled for later access at higher levels. Executives at

the highest levels will need to be evaluated for their international expertise, as well.

- Senior-level executives should be evaluated for their people-oriented skills. In particular, focusing on developing and maintaining close personal contacts with foreign area managers appears to be critical to success. These front-line contacts also appear to aid senior-level executive in developing and evaluating international business strategy. As such, senior-level executives should be encouraged to visit field operations to keep abreast of the feasibility of implementing business strategies. Extended business trips to foreign operations help senior-level managers to stay in touch with the inner workings of the organization and may help to ensure growth within the executive corps. Additionally, such visits could develop competencies among foreign managerial staff.

- Managers hired into foreign locations by American organizations have traditionally been provided with very few developmental interventions (Caudron, 1997). In many cases foreign managers are the products of exceptional educational experiences, often holding degrees from English speaking countries, rather than an internal development plan. These managers frequently represent the educational elite of their country and are hired purely because of their international educational experiences by a variety of multinational organizations, including American multinational enterprises (Caudron, 1997). Senior-level executives could help to develop

these managers through frequent visits focusing on business development strategies.

- Such foreign country managers could be rotated into U.S.-based headquarters positions for purposes of improving the international competencies of both the foreign country manager and the U.S.-based managerial staff. Such developmental interventions could lead help in the process of building multinational team and could represent an interesting developmental strategy for hospitality expatriate executives.

Higher Education

- Educational programs preparing students for work in international business should strive to expose students to all of the behavioral aspects of international business identified in this study. However, such educational programs should strive to provide sound business fundamentals for all functional disciplines as technical/functional expertise is the basis of managerial success. Internationally-focused education personnel should strive to develop the knowledge and skill components of international business, especially helping students in learning to gather global information. Students should be given opportunities to practice strategic planning on international basis.

- Perhaps a capstone course in strategic planning could serve to instill the importance of strategy formulation into students. Similarly, supervised

internships with international corporations could be made available to students to begin to learn tactical applications of strategic plans. Such internships could also be beneficial in developing personal communication skills required to top managers. Cross-cultural knowledge and skills could be provided in a classroom setting and then applied through internationally focused internships. Such internships may prove difficult to obtain; however, the benefits of preparing appropriately and adequately prepared international managers would appear to be quite substantial to U.S. business. Internships would also help students to understand the importance of personal traits and characteristics in international business. While the importance of flexibility and receptiveness to new ideas and thoughts can be taught in a classroom setting, students cannot truly appreciate the importance of these areas unless they experience at least one international assignment.

Researchers

- The current research focus into international success criteria appears indicative of managerial practice. The emphasis being given to cross-cultural knowledge, skills, attitudes, and traits should be continued as these types of behaviors appear very important to success in international business. Further explanation of the types of personal traits and characteristics that contribute the most to success would be helpful in selecting and developing U.S.-based internationally active managers.

- A model for implementing expatriate assignments as a systematic managerial developmental tool needs to be developed. Research into the types of expatriate assignments that most efficiently or most effectively develop the behaviors described in this study would enable Human Resource Development professionals to customize such assignments for each potential manager.

- This study used exploratory factor analysis. Another recommendation for further research is to use confirmatory factor analysis, and use bigger population and use chain hospitality companies as the research frame.

- Additional recommendation for research is to explore leadership qualities of executives and managers from different cultural backgrounds. Hofstede (1980) suggested that there should be differences in executives and leadership styles that are attributable to cultural aspects. The focus of the study would be to develop a set of recommendations for hospitality industry based on the differences found among these global executives.

- Research regarding national culture and organizational culture and its influences on the success of hospitality expatriate executives must be explored.

Limitations of the Study

Although the results of this study make several contributions to understanding the success of hospitality expatriate executives assignment to host countries, there are several limitations to the study.

- Analysis based on data from the organization that agreed to participate in the study introduces the possibility of bias. However, the fact that the eight organizations included in the sample represent a significant portion of international hospitality organizations that use expatriate executives does make inferences to similar firms not included in the sample possible.

- Focus on expatriate executives from a single organization cautions the generalizability of results to other business entities. The results cannot be generalized beyond the International Hotel and Restaurant Association's (IH&RA) realm.

- General manager's possession of substantial authority may adversely influence the mode of adjustment they engage in when assigned overseas. Although focus on high level managers might be different than the important individuals of most of the research in this area, research on expatriate managers, traditionally from higher positions in the organizational hierarchy (Shay, 1999), and their adjustment is important due to the critical role they play in implementing strategy overseas.

- The subordinates in this study were senior level expatriate executives. As such, the degree to which the expatriate manager tried to make personal or role innovation changes in these individuals probably differs significantly from the influence that the expatriate manager tries to exert on line-level employees. Thus, the results of this study may only be appropriate for making inferences about the relationships between similar types of respondent groups.

- In terms of the competencies, which competencies should be based, on company philosophy or location and culture of the overseas assignment?

- Lastly, the results may be limited by the nature of statistical analysis utilized in analyzing the data. The statistics derived by exploratory factor analysis could not make any inferences beyond the development of the factors. Further analysis should be done in terms of which factor predicts success of the hospitality expatriate executives.

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APPENDIX

APPENDIX A

APPROVAL FORM FOR RESEARCH INVOLVING HUMAN SUBJECTS

Oklahoma State University Institutional Review Board

Date: Thursday, November 09, 2006

IRB Application No   HE06106

Proposal Title: A Study to Examine the Training and Preparation of Hospitality Expatriate Executives

Reviewed and   Exempt
Processed as:

Status Recommended by Reviewer(s): Approved   Protocol Expires: 11/8/2007

Principal
Investigator(s

Gina Causin   Patrick J. Moreo
106 HES   210 HES
Stillwater, OK 74075   Stillwater, OK 74078

The IRB application referenced above has been approved. It is the judgment of the reviewers that the rights and welfare of individuals who may be asked to participate in this study will be respected, and that the research will be conducted in a manner consistent with the IRB requirements as outlined in section 45 CFR 46.

☑ The final versions of any printed recruitment, consent and assent documents bearing the IRB approval stamp are attached to this letter. These are the versions that must be used during the study.

As Principal Investigator, it is your responsibility to do the following:

1. Conduct this study exactly as it has been approved. Any modifications to the research protocol must be submitted with the appropriate signatures for IRB approval.
2. Submit a request for continuation if the study extends beyond the approval period of one calendar year. This continuation must receive IRB review and approval before the research can continue.
3. Report any adverse events to the IRB Chair promptly. Adverse events are those which are unanticipated and impact the subjects during the course of this research; and
4. Notify the IRB office in writing when your research project is complete.

Please note that approved protocols are subject to monitoring by the IRB and that the IRB office has the authority to inspect research records associated with this protocol at any time. If you have questions about the IRB procedures or need any assistance from the Board, please contact Beth McTernan in 219 Cordell North (phone: 405-744-5700, beth.mcternan@okstate.edu).

Sincerely,

Sue C. Jacobs, Chair
Institutional Review Board

Oklahoma State University Institutional Review Board

Date: Thursday, November 09, 2006

IRB Application No   HE06106

Proposal Title: A Study to Examine the Training and Preparation of Hospitality Expatriate
                         Executives

Reviewed and   Exempt
Processed as:

Status Recommended by Reviewer(s): Approved   Protocol Expires: 11/8/2007

Principal
Investigator(s

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106 HES   210 HES
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CFR 46.

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   stamp are attached to this letter. These are the versions that must be used during the study.

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1. Conduct this study exactly as it has been approved. Any modifications to the research protocol
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2. Submit a request for continuation if the study extends beyond the approval period of one calendar
   year. This continuation must receive IRB review and approval before the research can continue.
3. Report any adverse events to the IRB Chair promptly. Adverse events are those which are
   unanticipated and impact the subjects during the course of this research; and
4. Notify the IRB office in writing when your research project is complete.

Please note that approved protocols are subject to monitoring by the IRB and that the IRB office has the
authority to inspect research records associated with this protocol at any time. If you have questions
about the IRB procedures or need any assistance from the Board, please contact Beth McTernan in 219
Cordell North (phone: 405-744-5700, beth.mcternan@okstate.edu).

Sincerely,

Sue C. Jacobs, Chair
Institutional Review Board

APPENDIX B

COVER LETTER

OKLAHOMA STATE UNIVERSITY

October 17, 2006

Dear Colleague:

Greetings!

The purpose of this study is to examine the preparation and training of hospitality expatriate executives in order to have a successful expatriate assignment. This proposes a model for a successful hospitality expatriate assignment. It also examines demographic characteristics of the hospitality expatriate executives. Would you please take 3 minutes of your time and complete this survey by October 25th, 2006? A drawing for $100, $75, and $50 will be conducted at the end of the survey period. Your input is extremely important to the outcome of this study.

Gina Fe G. Causin, a doctoral candidate in the School of Hotel and Restaurant Administration at Oklahoma State University, is conducting this study along with Dr. Patrick J. Moreo, Professor and Committee Chair. Your response is completely **voluntary** and will be kept strictly **confidential**. The responses will be reported in aggregate form.

To participate in this survey, please go to:
http://frontpage.okstate.edu/STW/expatriateassignmentstudy/Questionnaire.htm . If you would like to receive the results of this study, please send an email to gina.causin@okstate.edu with your name and e-mail address. If you have any questions or need further assistance, please call me at (405) 744-9532, or contact the Office of the University Research Compliance at (405) 744-5700, Oklahoma State University, Stillwater, OK 74078.

We look forward to receiving your response. Thank you very much for participating in this study.

Sincerely,

Gina Fe G. Causin
Doctoral Candidate
School of Hotel and Restaurant Administration
College of Human Environmental Sciences, Oklahoma State University
E-mail: gina.causin@okstate.edu

Patrick J. Moreo, Ed.D.
Professor & Committee Chair
School of Hotel and Restaurant Administration, Oklahoma State University
E-mail: pmoreo@hotmail.com

OKLAHOMA STATE UNIVERSITY

November 08, 2006

Dear Colleague:

Greetings!

The purpose of this study is to examine the preparation and training of hospitality expatriate executives in order to have a successful expatriate assignment. This proposes a model for a successful hospitality expatriate assignment. It also examines demographic characteristics of the hospitality expatriate executives. Would you please take 3 minutes of your time and complete this survey by November 25th, 2006? A drawing for $100, $75, and $50 will be conducted at the end of the survey period. If you wish to be included in the drawing, please answer question 18 on the questionnaire. Your input is extremely important to the outcome of this study.

Gina Fe G. Causin, a doctoral candidate in the School of Hotel and Restaurant Administration at Oklahoma State University, is conducting this study along with Dr. Patrick J. Moreo, Professor and Committee Chair. Your response is completely **voluntary** and will be kept strictly **confidential**. The responses will be reported in aggregate form. Participants can withdraw at any time without penalty.

To participate in this survey, please go to:
http://frontpage.okstate.edu/STW/expatriateassignmentstudy/Questionnaire.htm . If you would like to receive the results of this study, please send an email to gina.causin@okstate.edu with your name and e-mail address. If you have any questions or need further assistance, please call me at (405) 744-9532, or contact the Office of the University Research Compliance at (405) 744-5700, Oklahoma State University, Stillwater, OK 74078. For information on subjects' rights, contact Dr. Sue C. Jacobs, IRB Chair, 219 Cordell North, 405-744-1676, or irb@okstate.edu .

There are no known risks associated with this project which are greater than those ordinarily encountered in daily life. I look forward to receiving your response. Thank you very much for participating in this study.

Sincerely,

Gina Fe G. Causin
Doctoral Candidate
School of Hotel and Restaurant Administration
College of Human Environmental Sciences, Oklahoma State University
E-mail: gina.causin@okstate.edu

Patrick J. Moreo, Ed.D.
Professor & Committee Chair
School of Hotel and Restaurant Administration
Oklahoma State University
E-mail: pmoreo@hotmail.com

APPENDIX C

THE PILOT QUESTIONNAIRE

From: Causin, Gina
Sent: Tuesday, November 14, 2006 4:17 PM
To: kanderson@chrie.org
Cc: Pat.Moreo@unlv.edu; Causin, Ginafe
Subject: Study on the Preparation and Training of Hospitality Expatriate Executives
November 14, 2006

Mr. Kevin Anderson
Director of Operations
International CHRIE

Dear Mr. Anderson:

Greetings!

We are currently conducting a study on the preparation and training of hospitality expatriate executives in order to have a successful expatriate assignment. The sampling frame identified for study is the I-CHRIE membership. We would like to request your good office to help us disseminate our online questionnaire to the I-CHRIE members. Your assistance will greatly help us with the success of this study. Thank you very much and we are looking forward for your reply.

Sincerely yours,

Gina Causin
I-CHRIE Member

Pat J. Moreo, Ed.D.
Chair & Advisor
I-CHRIE Member

A Study to Examine the Preparation and Training of Hospitality Expatriate Executives

Section 1: Background and Experience

1) Did you have overseas experience <u>prior</u> to taking your present job?
   ○ Yes
   ○ No

2) How many months have you worked as an expatriate executive in the host country?
   _____ #months

Section 2: Attributes of Hospitality Executives

3) Please indicate the extent to which you possess each of the following attributes:

Attribute	Not at all	To a least extent	To a moderate extent	To a major extent	To a great extent
Have technical and managerial expertise	○	○	○	○	○
Understand a variety of foreign business systems.	○	○	○	○	○
Coordinate the budgeting process between foreign operational headquarters.	○	○	○	○	○
Resilient, resourceful, optimistic, and energetic	○	○	○	○	○
Honesty and integrity	○	○	○	○	○
Emotional stability	○	○	○	○	○
Adaptability to new environment settings	○	○	○	○	○
Stable personal life	○	○	○	○	○
Ability to acknowledge, balance, and work with cultural differences	○	○	○	○	○
Orientation towards time	○	○	○	○	○
Demonstrate cultural empathy	○	○	○	○	○
Able to deal with complexity	○	○	○	○	○
Technically competent	○	○	○	○	○
Open-minded and flexible in thought and tactics	○	○	○	○	○
Ability to understand why foreigners behave the way they do	○	○	○	○	○
Awareness of own cultural background	○	○	○	○	○
Cultural interest and sensitivity	○	○	○	○	○
Language skills	○	○	○	○	○
Effectively conveys ideas and information to others	○	○	○	○	○
Effectively receive ideas and information from others	○	○	○	○	○
Understanding international finance	○	○	○	○	○
International negotiation skills	○	○	○	○	○
Understanding international marketing	○	○	○	○	○
Ability to work in international teams	○	○	○	○	○

	1	2	3	4	5
Get along with subordinates, peers, and those at higher levels of the organization.	○	○	○	○	○
Have the mental capacity to understand the overall workings of the organization and its environment.	○	○	○	○	○
Grasp on how all the parts of the organization fit together	○	○	○	○	○
View the organization in a holistic manner	○	○	○	○	○

4) From the following list, rank <u>the top 5</u> most important management skills that an international hospitality executive should possess. Use 1 to indicate the most important, 2 for 2nd most important, 3 for 3rd most important, 4 for 4th most important, and 5 for 5th most important.

Management Skill	1	2	3	4	5
Effectively convey ideas and information to others	○	○	○	○	○
Effectively receive ideas and information from others	○	○	○	○	○
Understanding international finance	○	○	○	○	○
International negotiation skills	○	○	○	○	○
Understanding international marketing	○	○	○	○	○
Ability to work in international teams	○	○	○	○	○
Get along with subordinates, peers, and those at higher levels of the organization.	○	○	○	○	○
Has the mental capacity to understand the overall workings of the organization and its environment.	○	○	○	○	○
Grasps on how all the parts of the organization fit together	○	○	○	○	○
Views the organization in a holistic manner	○	○	○	○	○

5) What cross-cultural training activities did your parent company provide? Please select YES if your company provided the training activity or NO if otherwise.

Cross Cultural Training Activity	Yes	No
Cross-cultural sensitivity training	○	○
Cross-cultural team-building	○	○
Cross-cultural management	○	○
Cross-cultural negotiation	○	○
Cultural diversity training	○	○
Cross cultural relocation	○	○
Youth cross cultural training	○	○
Business and culture	○	○
Business etiquette	○	○

6) The cross cultural training activities that my parent company provide are:

- ○ Extremely effective
- ○ Effective
- ○ Somewhat effective
- ○ Not effective

7) Please indicate the country of the parent (hotel) company for which you work:

_____

8) Please indicate your current country of citizenship (e.g. France, Germany, United States of America, etc.):

_____ (Country of Citizenship)

9) Please indicate your job title:

_____

10) Please indicate the number of months of hospitality experience you have:

_____

11) Please select the department in which you are working:

○	Personnel	○	General Management
○	Marketing/Sales	○	Front Office
○	Food & Beverages	○	Financial Control
○	Housekeeping	○	Other, please specify:_____

12) Please select the ONE category (by price) which best describes the service level of your hotel:

○ Budget Hotel (Two Star Hotels)
○ Mid Priced Hotel (Two Star to Three Star)
○ Boutique (Three Star to Four Star)
○ Luxury Hotels (Four Star to Five Star)

13) Consider your overall success as an expatriate executive. Please indicate the level of your success:

○ Extremely successful
○ Successful
○ Somewhat successful
○ Not successful

Section 3: Demographic Information

14) Please indicate your age group

○	20-25	○	46-50
○	26-30	○	51-55
○	31-35	○	56-60
○	36-40	○	61-65
○	41-45	○	66+

15) Please indicate your gender:

○ Female
○ Male

16) Please indicate your current marital status:

      ○   Married
      ○   Divorced
      ○   Never been married
      ○   Widowed

17) Please indicate the highest educational level you have obtained/achieved:

      ○   High School Degree
      ○   Some College
      ○   College Degree (hospitality undergraduate degree)
      ○   College Degree (other undergraduate degrees)
      ○   Some Graduate School
      ○   Graduate School Degree
      ○   Other, please specify: _____

18) If you wish to be included in the drawing for $100, $75 or $50 please provide your email address:
_____

APPENDIX D

THE ONLINE QUESTIONNAIRE

OKLAHOMA STATE UNIVERSITY

A STUDY TO EXAMINE THE PREPARATION AND TRAINING OF HOSPITALITY EXPATRIATE EXECUTIVES

Dear Colleague:

Thank you for participating in this study. If you wish to know the result, please e-mail us at gina.causin@okstate.edu .

Sincerely,

Gina Causin, Ph.D. Candidate
Dr. Pat J. Moreo, Advisor

Section 1: Background and Experience

1) Did you have overseas experience prior to taking your present job?
   ○ Yes
   ○ No

2) How many months have you worked as an expatriate executive in the host country?
   _____ # months

Section 2: Attributes of Hospitality Executives

3) Please indicate the extent to which you possess each of the following attributes:

Attribute	Not at all	To a least extent	To a moderate extent	To a major extent	To a great extent
Have technical and managerial expertise	○	○	○	○	○
Understand the variety of foreign business systems	○	○	○	○	○
Coordinate the budgeting process between foreign operational headquarters	○	○	○	○	○
Resilient, resourceful, optimistic, and energetic	○	○	○	○	○
Honesty and integrity	○	○	○	○	○

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Emotional stability	○	○	○	○	○
Adaptability to new environment settings	○	○	○	○	○
Stable personal life	○	○	○	○	○
Ability to acknowledge, balance, and work with cultural differences	○	○	○	○	○
Orientation towards time	○	○	○	○	○
Demonstrate cultural empathy	○	○	○	○	○
Able to deal with complexity	○	○	○	○	○
Technically competent	○	○	○	○	○
Open-minded and flexible in thought and tactics	○	○	○	○	○
Ability to understand why foreigners behave the way they do	○	○	○	○	○
Awareness of own cultural background	○	○	○	○	○
Cultural interest and sensitivity	○	○	○	○	○
Language skills	○	○	○	○	○
Effectively conveys ideas and information to others	○	○	○	○	○
Effectively receive ideas and information from others	○	○	○	○	○
Understanding international finance	○	○	○	○	○
International negotiation skills	○	○	○	○	○
Understanding international marketing	○	○	○	○	○
Ability to work in international teams	○	○	○	○	○
Get along with subordinates, peers, and those at higher levels of the organization	○	○	○	○	○
Have the mental capacity to understand the overall workings of the organization and its environment	○	○	○	○	○
Grasp on how all the parts of the organization fit together	○	○	○	○	○
View the organization in a holistic manner	○	○	○	○	○

4) From the following list, rank the top 5 most important management skills that an international hospitality executive should possess. Use 1 to indicate the most important, 2 for 2nd most important, 3 for 3rd most important, 4 for 4th most important, and 5 for 5th most important.

Management Skill	1	2	3	4	5
Effectively convey ideas and information to others	○	○	○	○	○
Effectively receive ideas and information from others	○	○	○	○	○

Understanding international finance	○	○	○	○	○
International negotiation skills	○	○	○	○	○
Understanding international marketing	○	○	○	○	○
Ability to work in international teams	○	○	○	○	○
Get along with subordinates, peers, and those at higher levels of the organization	○	○	○	○	○
Has the mental capacity to understand the overall workings of the organization and its environment	○	○	○	○	○
Grasps on how all the parts of the organization fit together	○	○	○	○	○
Views the organization in a holistic manner	○	○	○	○	○

5) What cross-cultural training activities did your parent company provide? Please select YES if your company provided the training activity or NO if otherwise.

Cross Cultural Training Activity	Yes	No
Cross-cultural sensitivity training	○	○
Cross-cultural team building	○	○
Cross-cultural management	○	○
Cross-cultural negotiation	○	○
Cultural diversity training	○	○
Cross cultural relocation	○	○
Youth cross cultural training	○	○
Business and culture	○	○
Business etiquette	○	○

6) The cross cultural training activities that my parent company provide are:
- ○ Extremely effective
- ○ Effective
- ○ Somewhat effective
- ○ Not effective
- ○ Not Applicable

7) Please indicate the country of the parent company for which you worked:

8) Please indicate your current country of citizenship (e.g. France, Germany, United States of America, etc.)

(Country of Citizenship)

9) Please indicate your job title:

mhtml:file://E:\hrad6000\content\Questionnaire.mht   7/17/2007

10) Please indicate the number of months of hospitality experience you had:
#months

11) Please select the department in which you have worked:
- ○ Personnel
- ○ Marketing/Sales
- ○ Food & Beverages
- ○ Housekeeping
- ○ General Management
- ○ Front Office
- ○ Financial Control
- ○ Other, please specify:
- ○ Not Applicable

12) Please select the ONE category (by price) which best describes the service level of your establishment:
- ○ Budget Hotel (Two Star Hotels)
- ○ Mid priced Hotel (Two Star to Three Star)
- ○ Boutique (Three Star to Four Star)
- ○ Luxury Hotels (Four Star to Five Star)
- ○ Not Applicable

13) Consider your overall success as an expatriate executive. Please indicate the level of your success:
- ○ Extremely successful
- ○ Successful
- ○ Somewhat successful
- ○ Not successful
- ○ Not Applicable

Section 3: Demographic Information

14) Please indicate your age group:
- ○ 20-25   ○ 46-50
- ○ 26-30   ○ 51-55
- ○ 31-35   ○ 56-60
- ○ 36-40   ○ 61-65
- ○ 41-45   ○ 66+

15) Please indicate your gender:
- ○ Female
- ○ Male

16) Please indicate your current marital status:
- ○ Married
- ○ Divorced
- ○ Never been married
- ○ Widowed

17) Please indicate the highest educational level you have obtained/achieved:
- ○ High School Degree
- ○ Some College
- ○ College Degree (hospitality undergraduate degree)
- ○ College Degree (other undergraduate degrees)
- ○ Some Graduate School
- ○ Graduate School Degree
- ○ Other, please specify:

18) If you wish to be included in the drawing for $100, $75, or $50 please provide your email address:

Developed by: Gina Fe Garcia-Causin
School of Hotel and Restaurant Administration
College of Human Environmental Sciences
Oklahoma State University

Submit | Reset

APPENDIX E

THE CODEBOOK

**A Study to Examine the Preparation and Training of
Hospitality Expatriate Executives**

Codebook

Variable Name: Responum
Variable Label: Respondent Number
Values and Values Label: Range

Variable Name: q1
Variable Label: Did you have overseas experience prior to taking your present job?
Values and Values Label:

         1 = No
         2 = Yes
         9 = Missing/No Answer

Variable Name: q2
Variable Label: How many months have you worked as an expatriate executive in the host country?
Values and Values Label:

         1 = Less than 6 months
         2 =   7-12 months
         3 = 13-24 months
         4 = 25-36 months
         5 = 37-48 months
         6 = 49-60 months
         7 = 61 months and above
         9 = Missing/No Answer

Variable Name: q3a
Variable Label: Have technical and managerial expertise
Values and Values Label:

         1 = Not at all
         2 = To a least extent
         3 = To a moderate extent
         4 = To a major extent
         5 = To a great extent
         9 = Missing/No Answer

Variable Name: q3b
Variable Label: Understand a variety of foreign business systems
Values and Values Label:
       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3c
Variable Label: Coordinate the budgeting process between foreign operational headquarters
Values and Values Label:
       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3d
Variable Label: Resilient, resourceful, optimistic, and energetic
Values and Values Label:
       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3e
Variable Label: Honesty and integrity
Values and Values Label:
       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3f
Variable Label: Emotional stability
Values and Values Label:

1 = Not at all
            2 = To a least extent
            3 = To a moderate extent
            4 = To a major extent
            5 = To a great extent
            9 = Missing/No Answer

Variable Name: q3g
Variable Label: Adaptability to new environment settings
Values and Values Label:
            1 = Not at all
            2 = To a least extent
            3 = To a moderate extent
            4 = To a major extent
            5 = To a great extent
            9 = Missing/No Answer

Variable Name: q3h
Variable Label: Stable personal life
Values and Values Label:
            1 = Not at all
            2 = To a least extent
            3 = To a moderate extent
            4 = To a major extent
            5 = To a great extent
            9 = Missing/No Answer

Variable Name: q3i
Variable Label: Ability to acknowledge, balance, and work with cultural differences
Values and Values Label:
            1 = Not at all
            2 = To a least extent
            3 = To a moderate extent
            4 = To a major extent
            5 = To a great extent
            9 = Missing/No Answer

Variable Name: q3j
Variable Label: Orientation towards time
Values and Values Label:
            1 = Not at all
            2 = To a least extent
            3 = To a moderate extent
            4 = To a major extent

5 = To a great extent

9 = Missing/No Answer

Variable Name: q3k

Variable Label: Demonstrate cultural empathy

Values and Values Label:

1 = Not at all

2 = To a least extent

3 = To a moderate extent

4 = To a major extent

5 = To a great extent

9 = Missing/No Answer

Variable Name: q3l

Variable Label: Able to deal complexity

Values and Values Label:

1 = Not at all

2 = To a least extent

3 = To a moderate extent

4 = To a major extent

5 = To a great extent

9 = Missing/No Answer

Variable Name: q3m

Variable Label: Technically competent

Values and Values Label:

1 = Not at all

2 = To a least extent

3 = To a moderate extent

4 = To a major extent

5 = To a great extent

9 = Missing/No Answer

Variable Name: q3n

Variable Label: Open-minded and flexible in thought and tactics

Values and Values Label:

1 = Not at all

2 = To a least extent

3 = To a moderate extent

4 = To a major extent

5 = To a great extent

9 = Missing/No Answer

Variable Name: q3o
Variable Label: Ability to understand why foreigners behave the way they do
Values and Values Label:

        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3p
Variable Label: Awareness of own cultural background
Values and Values Label:

        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3q
Variable Label: Cultural interest and sensitivity
Values and Values Label:

        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3r
Variable Label: Language skills
Values and Values Label:

        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3s
Variable Label: Effectively conveys ideas and information to others
Values and Values Label:

        1 = Not at all

        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3t
Variable Label: Effectively receive ideas and information from others
Values and Values Label:
        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3u
Variable Label: Understanding international finance
Values and Values Label:
        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3v
Variable Label: International negotiation skills
Values and Values Label:
        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q3w
Variable Label: Understanding international marketing
Values and Values Label:
        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent

9 = Missing/No Answer

Variable Name: q3x
Variable Label: Ability to work in international teams
Values and Values Label:

       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3y
Variable Label: Get along with subordinates, peers, and those at higher levels of the organization
Values and Values Label:

       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3z
Variable Label: Have the mental capacity to understand the overall workings of the organization and its environment
Values and Values Label:

       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3aa
Variable Label: Grasp on how all the parts of the organization fir together
Values and Values Label:

       1 = Not at all
       2 = To a least extent
       3 = To a moderate extent
       4 = To a major extent
       5 = To a great extent
       9 = Missing/No Answer

Variable Name: q3bb
Variable Label: View the organization in a holistic manner
Values and Values Label:

        1 = Not at all
        2 = To a least extent
        3 = To a moderate extent
        4 = To a major extent
        5 = To a great extent
        9 = Missing/No Answer

Variable Name: q4a
Variable Label: Effectively convey ideas and information to others
Values and Values Label:

        1 = 1st Most Important
        2 = 2nd Most Important
        3 = 3rd Most Important
        4 = 4th Most Important
        5 = 5th Most Important
        9 = Missing/No Answer

Variable Name: q4b
Variable Label: Effectively receive ideas and information from others
Values and Values Label:

        1 = 1st Most Important
        2 = 2nd Most Important
        3 = 3rd Most Important
        4 = 4th Most Important
        5 = 5th Most Important
        9 = Missing/No Answer

Variable Name: q4c
Variable Label: Understanding international finance
Values and Values Label:

        1 = 1st Most Important
        2 = 2nd Most Important
        3 = 3rd Most Important
        4 = 4th Most Important
        5 = 5th Most Important
        9 = Missing/No Answer

Variable Name: q4d
Variable Label: International negotiation skills
Values and Values Label:

        1 = 1st Most Important

$2 = 2^{nd}$ Most Important
$3 = 3^{rd}$ Most Important
$4 = 4^{th}$ Most Important
$5 = 5^{th}$ Most Important
$9 =$ Missing/No Answer

Variable Name: q4e
Variable Label: Understanding international marketing
Values and Values Label:
$1 = 1^{st}$ Most Important
$2 = 2^{nd}$ Most Important
$3 = 3^{rd}$ Most Important
$4 = 4^{th}$ Most Important
$5 = 5^{th}$ Most Important
$9 =$ Missing/No Answer

Variable Name: q4f
Variable Label: Ability to work in international teams
Values and Values Label:
$1 = 1^{st}$ Most Important
$2 = 2^{nd}$ Most Important
$3 = 3^{rd}$ Most Important
$4 = 4^{th}$ Most Important
$5 = 5^{th}$ Most Important
$9 =$ Missing/No Answer

Variable Name: q4g
Variable Label: Get along with subordinates, peers, and those at higher levels of the organization
Values and Values Label:
$1 = 1^{st}$ Most Important
$2 = 2^{nd}$ Most Important
$3 = 3^{rd}$ Most Important
$4 = 4^{th}$ Most Important
$5 = 5^{th}$ Most Important
$9 =$ Missing/No Answer

Variable Name: q4h
Variable Label: Has the mental capacity to understand the overall workings of the organization and its environment
Values and Values Label:
$1 = 1^{st}$ Most Important
$2 = 2^{nd}$ Most Important
$3 = 3^{rd}$ Most Important

4 = 4th Most Important
5 = 5th Most Important
9 = Missing/No Answer

Variable Name: q4i
Variable Label: Grasps on how all the parts of the organization fit together
Values and Values Label:
    1 = 1st Most Important
    2 = 2nd Most Important
    3 = 3rd Most Important
    4 = 4th Most Important
    5 = 5th Most Important
    9 = Missing/No Answer

Variable Name: q4j
Variable Label: Views the organization in a holistic manner
Values and Values Label:
    1 = 1st Most Important
    2 = 2nd Most Important
    3 = 3rd Most Important
    4 = 4th Most Important
    5 = 5th Most Important
    9 = Missing/No Answer

Variable Name: q5a
Variable Label: Cross-cultural sensitivity training
Values and Values Label:
    1 = No
    2 = Yes
    9 = Missing/No Answer

Variable Name: q5b
Variable Label: Cross-cultural team building
Values and Values Label:
    1 = No
    2 = Yes
    9 = Missing/No Answer

Variable Name: q5c
Variable Label: Cross-cultural management
Values and Values Label:
    1 = No
    2 = Yes
    9 = Missing/No Answer

Variable Name: q5d
Variable Label: Cross-cultural negotiation
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q5e
Variable Label: Cultural diversity training
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q5f
Variable Label: Cross cultural relocation
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q5g
Variable Label: Youth cross cultural training
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q5h
Variable Label: Business and culture
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q5i
Variable Label: Business etiquette
Values and Values Label:
        1 = No
        2 = Yes
        9 = Missing/No Answer

Variable Name: q6
Variable Label: The cross cultural training activities that my parent company provide are:
Values and Values Label:

       1 = Not Effective
       2 = Somewhat Effective
       3 = Effective
       4 = Extremely Effective
       9 = Missing/No Answer

Variable Name: q7
Variable Label: Please indicate the country of the parent (hotel) company for which you work
Values and Values Label: String

Variable Name: q8
Variable Label: Please indicate your current country of citizenship (e.g. France, Germany, United States of America, etc.)
Values and Values Label: String

Variable Name: q9
Variable Label: Please indicate your job title
Values and Values Label: String

Variable Name: q10
Variable Label: Please indicate number if months of hospitality experience you have
Values and Values Label:

       1 = Less than 6 months
       2 =   7-12 months
       3 = 13-24 months
       4 = 25-36 months
       5 = 37-48 months
       6 = 49-60 months
       7 = 61 months and above
       9 = Missing/No Answer

Variable Name: q11
Variable Label: Please select the department in which you are working
Values and Values Label:

       1 = Personnel
       2 = Marketing/Sales
       3 = Food & Beverages
       4 = Housekeeping
       5 = General Management

6 = Front Office
7 = Financial Control
8 = Other
9 = Missing/No Answer

Variable Name: q11Other
Variable Label: Other, please specify
Values and Values Label: String

Variable Name: q12
Variable Label: Please select the ONE category (by price) which best describes the
               service level of your hotel:
Values and Values Label:
       1 = Budget Hotel (Two Star Hotels)
       2 = Mid Priced Hotel (Two Star to Three Star)
       3 = Boutique Hotel (Three Star to Four Star)
       4 = Luxury Hotels (Four Star to Five Star)
       9 = Missing/No Answer

Variable Name: q13
Variable Label: Consider you overall success as an expatriate executive. Please indicate
               the level of your success:
Values and Values Label:
       1 = Not Successful
       2 = Somewhat Successful
       3 = Successful
       4 = Extremely Successful
       9 = Missing/No Answer

Variable Name: q14
Variable Label: Please indicate your age group
Values and Values Label:
       1 = 20-25
       2 = 26-30
       3 = 31-35
       4 = 36-40
       5 = 41-45
       6 = 46-50
       7 = 51-55
       8 = 56-60
       9 = 61-65
       10 = 66+
       99 = Missing/No Answer

Variable Name: q15
Variable Label: Please indicate your gender
Values and Values Label:

       1 = Male
       2 = Female
       9 = Missing/No Answer

Variable Name: q16
Variable Label: Please indicate your current marital status:
Values and Values Label:

       1 = Married
       2 = Divorced
       3 = Never been married
       4 = Widowed
       9 = Missing/No Answer

Variable Name: q17
Variable Label: Please indicate the highest educational level you have
obtained/achieved:
Values and Values Label:

       1 = High School Degree
       2 = Some College
       3 = College Degree (hospitality undergraduate degree)
       4 = College Degree (other undergraduate degrees)
       5 = Some Graduate School
       6 = Graduate School Degree
       7 = Other
       9 = Missing/No Answer

Variable Name: q17Other
Variable Label: Other, please specify
Values and Values Label: String

Variable Name: q18
Variable Label: If you wish to be included in the drawing for $100, $75, or $50 please
            provide your email address:
Values and Values Label: String

APPENDIX F

CITI COURSE COMPLETION RECORD

CITI Course in The Protection of Human Research Subjects

Thursday, July 6, 2006

**CITI Course Completion Record
for Gina Fe Causin**

To whom it may concern:

On *7/6/2006, Gina Fe Causin* (username=ginacausin; Employee Number=) completed all *CITI Program* requirements for the *Basic CITI* Course in The Protection of Human Research Subjects.

Learner Institution: *Oklahoma State University*

Learner Group: *Social/Behavioral Research Investigator Faculty/Staff/Student*

Learner Group Description:

Contact Information:
Gender: Female
Department: School of Hotel and Restaurant Administration
Which course do you plan to take?: Social & Behavioral Investigator Course Only
Role in human subjects research: Student Researcher
Mailing Address:
Email: ginafe.causin@okstate.edu
Office Phone: (405) 744-953
Home Phone:

The Required Modules for *Social/Behavioral Research Investigator Faculty/Staff/Student* are:	Date completed
Introduction	07/05/06
History and Ethical Principles - SBR	07/05/06
Defining Research with Human Subjects - SBR	07/05/06
The Regulations and The Social and Behavioral Sciences - SBR	07/05/06
Assessing Risk in Social and Behavioral Sciences - SBR	07/05/06
Informed Consent - SBR	07/05/06
Privacy and Confidentiality - SBR	07/05/06
Internet Research - SBR	07/06/06
Research With Protected Populations - Vulnerable Subjects: An Overview	07/06/06

https://www.citiprogram.org/members/courseandexam/certificate_print.asp?strKeyID=E927704B-28F0-4C... 7/6/2006

| Conflicts of Interest in Research Involving Human Subjects | 07/06/06 |
| Oklahoma State University module | 07/06/06 |

Additional optional modules completed: **Date completed**

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI participating institution. Falsified information and unauthorized use of the CITI course site is unethical, and may be considered scientific misconduct by your institution.

Paul Braunschweiger Ph.D.
Professor, University of Miami
Director Office of Research Education
CITI Course Coordinator

VITA

Gina Fe Garcia-Causin

Candidate for the Degree of

Doctor of Philosophy

Thesis: A STUDY TO EXAMINE THE PREPARATION AND TRAINING OF
          HOSPITALITY EXPATRIATE EXECUTIVES

Major Field: Human Environmental Sciences, Hospitality Administration

Biographical:

> Personal Data: Born in Malaybalay, Bukidnon, Philippines. November 28, 1969;
> daughter of Bernardo and Elsie Garcia. Married to Robert Raymund D.
> Causin, July 20, 1996.

> Education: Received Bachelor of Science degree on Hotel and Restaurant
> Management from Mindanao State University, Marawi City, Philippines in
> April 1991. Completed the academic requirements for the Master in Public
> Administration from Ateneo de Cagayan Xavier University. Completed the
> requirements for the Master of Science degree with a major in Hospitality
> Administration at Oklahoma State University in May, 2003.

> Experience: Business center operator and a front desk assistant at Philtown Hotel;
> Municipal Trade and Industry Officer, Department of Trade and Industry;
> Project Officer Talakag Resettlement Project and Odiongan Hydro Project,
> Xavier Science Foundation; Office Manager GEM Project, LBII –USAID;
> In-country Coordinator Worldwide Farmer-to-Farmer Program in the
> Philippines, Land O'Lakes IDD; Part-time instructor of the Department of
> Hotel and Restaurant Management, Southern de Oro Philippines College;
> Campus Coordinator OSU Great Plains Interactive Distance Education
> Alliance; Coordinator Federal Relations Committee of the Board on Human
> Sciences; Teaching and Research Associate School of Hotel and Restaurant
> Administration and the College of Human Environmental Sciences.

> Professional Memberships: Member of International Council on Hotel, Restaurant
> Institution and Education, President Graduate and Professional Student
> Government Association, President Graduate Students in HES, HRAD GSA,
> Secretary of the Eta Sigma Delta, Kappa Omicron Nu & NAGPS.

Name: Gina Fe Garcia Causin Date of Degree: July, 2007

Institution: Oklahoma State University Location: Stillwater, Oklahoma

Title of Study: A STUDY TO EXAMINE THE PREPARATION AND TRAINING
OF HOSPITALITY EXPATRIATE EXECUTIVES

Pages in the Study: 175 Candidate for the Degree of Doctor of Philosophy

Major Field: Human Environmental Sciences, Hospitality Administration

Scope and Method of Study: This study solicited information from the members of the International Hotel and Restaurant Association (IH&RA) to examine the preparation and training of hospitality expatriate executives for a successful assignment overseas. The survey was developed as a self-administered instrument in three parts. The first part asked questions related to respondents' professional background that dealt with overseas experience and hospitality experience. The second part asked questions about the extent that the respondents possess the attributes of a hospitality expatriate executives, the management skills that respondents should possess and the effectiveness of the cross-cultural training activities that parent company provided. The third section of the questionnaire asked questions about the demographics that dealt with gender, age, annual income, and position of the expatriate executive.

Findings and Conclusions: The majority of the respondents were between the ages of 51 to 60 years old, male, married and highly educated (most of them had graduate degree). They had prior overseas experience, had worked in the host country for six months and they worked in luxury hotel properties. There was a broad variation in professional backgrounds, years of international experience, and expatriate assignments across the respondents. Exploratory factor analysis generated three components of a model for a successful hospitality expatriate assignment. These three components or factors were personal competencies, global management skills, and expatriate adjustment. Independent samples t test revealed that seven cross-cultural training activities provided by the parent company were effective. And One-Way Analysis of Variance indicated that management skills vary according to the location of the parent company and country of origin of the hospitality expatriate executives.

The findings of this study suggested that the success of an overseas assignment was determined by personal competencies, global management skills and expatriate adjustment. However, it was not verified which of these factors would influence successful expatriate assignment. In addition, cross cultural training should be taken into account.

ADVISOR'S APPROVAL: Patrick J. Moreo, Ed.D.