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A transactional stress and coping perspective on expatriation: new insights on the roles of age, gender and expatriate type

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Abstract

Purpose – This work sheds new light on the roles of gender, age and expatriation type—self-initiated expatriate (SIE) vs. assigned expatriate (AE)—by applying the transactional theory of stress and coping (and a validated measurement tool) to the expatriation experience.

Design/methodology/approach – Based on quantitative data from 448 expatriates, the authors examined the coping mechanisms (cognitions and actions) employed by senior and younger expatriates, females and males and SIE and AEs when they face hardships while working abroad.

Findings – Younger expatriates display less active problem-solving coping, planning, and restraint and consume more alcohol and drugs. Female expatriates express their emotions and use social support more than their male counterparts. SIEs rely on emotional social support more than AEs.

Practical implications – Recognizing that individual repertoires of responses to expatriate challenges are bounded by personal characteristics—such as age, gender, and expatriation type—should improve efforts to support expatriates. This research suggests that expatriate support should be tailored. It offers indications on who needs what.

Originality/value – This work provides a fresh perspective and new insights into classic topics (age, gender, and expatriation type). Individuals react differently abroad. They have different resources and face different demands (to a certain extent) that lead to different coping reactions. Older people manage their emotions better, and female expatriates and SIEs gather and use support; these abilities are assets abroad.

Keywords Coping, Expatriation, Age, Gender, Self-initiated expatriate, Assigned expatriate, International experience

Paper type Research paper

Introduction

Susan Folkman and Richard Lazarus, pioneers in the study of coping, observed in 1988 that "[i]n recent years conviction has grown that it is how individuals cope with stress, not stress *per se*, that influences their psychological well-being, social functioning, and somatic health" (Folkman and Lazarus, 1988, p. 5). Indeed, coping, defined as "cognitive and behavioral efforts to manage psychological stress" (Lazarus, 1993, p. 237), has been shown to be important in various challenging situations, such as bereavement (Coifman *et al.*, 2007), organizational change (Fugate *et al.*, 2008), abusive supervision (Nandkeolyar *et al.*, 2014), interrole conflicts (Hecht and McCarthy, 2010), and management of work stressors in general (Zhang *et al.*, 2019). In such cases, coping responses affect outcomes as important as health, performance, and life satisfaction.

Authors have concurred that expatriation is a significant disruption in individuals' lives (e.g. Lazarova *et al.*, 2010); for instance, stress increases during these experiences have been medically measured (Anderzén and Arnetz, 1997). Indeed, expatriates face different

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challenges, from loneliness and isolation to communication and interaction issues with locals, a possible gap between expectations and reality, and more generally challenges in adjusting to a different culture (manifested in what has been called "culture shock" [e.g. Black and Mendenhall, 1991]). These problems can be worsened by spouse-related issues (Hechanova *et al.*, 2003) and the difficulty that the family encounters in finding a new balance, that is, a new equilibrium and a new way to function happily. Surprisingly, relatively little research has been dedicated to examining coping in the context of expatriation. In fact, although some research indicates that expatriates' coping reactions affect their professional and cultural adjustment and well-being (Selmer, 1999a; Selmer and Leung, 2007; Stahl and Caligiuri, 2005; Ward and Kennedy, 2001), little is known about how various expatriates cope with expatriation challenges (for exceptions concerning the role of home and host countries, see Selmer (1999b, 2002), and for the role of the spouse, see Chen and Shaffer, 2018).

This research gap has been emphasized by calls identifying the need for expatriation research to be more context-specific (Reiche *et al.*, 2019) and, more specifically, the need to better understand different types of expatriates (Shaffer *et al.*, 2012). Indeed, expatriates have long been considered a homogeneous group (Lauring and Selmer, 2018; Peltokorpi and Froese, 2009). However, a strong body of knowledge (summarized in McNulty and Brewster, 2019) indicates that the expatriate population is quite diverse and that the use of theoretically meaningful categories can provide important insights in expatriation research (Reiche *et al.*, 2019; Shaffer *et al.*, 2012).

We investigate the differences in how various expatriate categories cope with expatriation hardships. While coping is shaped by both contextual and personal features (Lazarus and Folkman, 1984), this work focuses on key personal characteristics of expatriates (age, gender, and type of expatriation) to examine interindividual differences in the expatriate coping process. Since very limited research has been done on expatriate coping antecedents and on how different expatriate types cope, we focus our investigation on basic expatriation characteristics. Studying such core expatriate features will help provide human resources professionals (and expatriates) with clear and actionable knowledge. To start, while international experience, a strong correlate to age, has received much attention (e.g. Suutari *et al.*, 2018b), age has been neglected in expatriation research. However, a deeper understanding of the role of age can help employers manage an aging workforce and deliver on their promises of successful international careers to new hires. Indeed, if age has been shown to affect expatriate adjustment (Hechanova *et al.*, 2003), to the best of our knowledge, it has only been specifically studied by two research articles, neither of which examines coping (Selmer *et al.*, 2009; Wechtler *et al.*, 2015). Nevertheless, domestic studies have provided evidence of and theoretical support for the relationship between coping choices and age (Aldwin, 1991; Cartensen, 1991; McCrae, 1982; Monteiro *et al.*, 2014).

The role of gender has also been examined in expatriation, and scholars have tried to understand how females and males live with expatriation, notably who adjusts better abroad and why. Conflicting findings and varied reasoning show that these questions are not easily answered (Haslberger, 2010; Lazarova *et al.*, 2010; Salamin and Davoine, 2015; Selmer and Leung, 2003). While arguments regarding host cultures (and current social norms) have been advanced (Caligiuri and Tung, 1999)—with some cultural types being more difficult for women to live in than others—we believe that a coping perspective may further elucidate this question. We argue that, in addition to contextual explanations, variations in coping cognitions and actions between females and males can explain some of the differences observed in their expatriation experiences.

Finally, one of the most lively and productive streams of expatriate research in the last 2 decades examines how self-initiated expatriates (SIEs) and how they and their experiences differ from assigned expatriates (AEs) and their experiences. These designations refer to the expatriation type—either organizationally initiated, involving the expatriate being sent on an assignment, or self-initiated (Andresen *et al.*, 2014; Dickmann *et al.*, 2018; Suutari and Brewster, 2000). Our coping approach can inform research on this topic by providing a new perspective focused on the strategies displayed to address expatriation challenges. Research has identified

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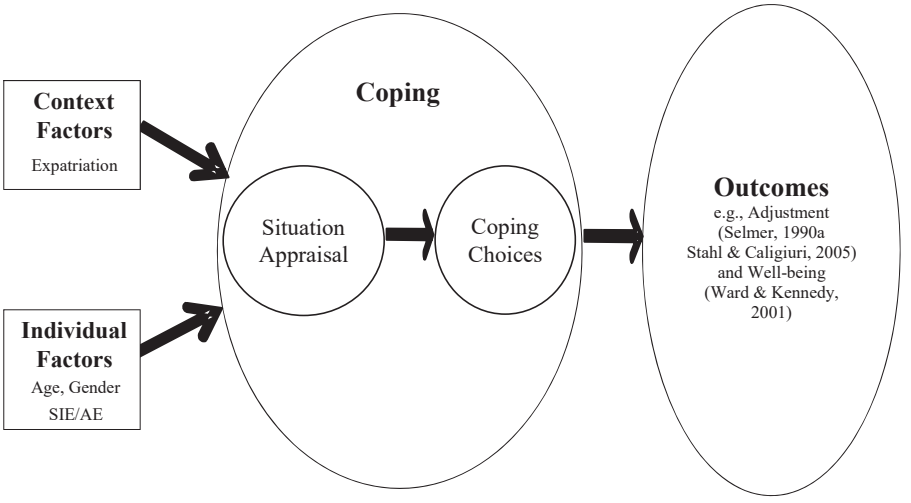
differences in motivation, time spent abroad, work sector, seniority, and adjustment to the country between the two groups (Peltokorpi and Froese, 2009; Suutari *et al.*, 2018a). We argue that these two groups possess different coping resources and appraise problems differently, and we expect expatriates in these two groups to have different coping responses.

We apply the transactional theory of stress and the related coping theoretical framework (Lazarus and Folkman, 1984) as well as a validated measurement tool (the Coping Orientation to Problems Experienced (COPE) Inventory – Carver *et al.*, 1989) to make two main contributions to the international human resource management literature. First, we shed new light on the roles of gender, age and expatriation type (SIE vs. AE) by applying the transactional theory of stress and coping with the expatriation experience. The coping perspective, rarely applied to study expatriation despite the challenging nature of such experience, allows us to gather new insights. Second, we contribute to a more granular understanding of expatriation by studying different expatriate types and forms of international mobility and by examining a wide variety of coping cognitions and actions. This article is structured as follows. We briefly outline coping theory and apply it to expatriation to build a coping–clustering model to examine the selected expatriate categories. Based on this discussion, we develop our hypotheses. Then, we outline our methodology and detail our findings before discussing the meaning of the presented evidence and detailing the implications for further relevant scholarly work and practitioners.

Coping and expatriation

The transactional theory of stress and coping (Folkman and Lazarus, 1985) posits that environmental and personal characteristics affect the coping process through the individual's appraisal of a situation (notably whether it is a risky threat or a motivating challenge, called primary appraisal) and consequent choice of coping responses (secondary appraisal). Therefore, individual resources constrain coping choices (Lazarus and Folkman, 1984). This theory suggests that different categories of expatriates who have different resources are likely to appraise expatriation stressors differently and cope differently with the challenges of expatriation. Beyond the scope of this paper but central to this theory, coping affects various outcomes (Selmer, 1999a; Stahl and Caligiuri, 2005; Ward and Kennedy, 2001). Figure 1 shows



Source(s): Adapted from Lazarus and Folkman (1984)

Figure 1. Transactional theory of stress and coping applied to expatriate age, gender and type

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this overall framework. The current research does not specifically measure primary appraisal but examines the impact of personal factors on coping choices.

A wide range of coping reactions are displayed in response to stressful situations. These reactions can be classified according to their function and objective. Coping reactions are intended to either modify the situation causing the stress (for example, by solving or alleviating the problem being faced) or regulate the stressful emotions that the situation elicits in the individual (for example, by deciding to downgrade the importance of the situation or ignore it) (Folkman *et al.*, 1986). The former class of reactions is termed problem-focused coping strategies, and their aim is to alter stressors. The latter class of reactions—emotion-focused coping strategies—is intended to minimize the negative emotions elicited by a stressful situation without affecting the stressors (Folkman and Lazarus, 1980).

This is the most common way in which coping strategies are ordered and was operative (explicitly or implicitly) prior to the crucial works of Richard Lazarus and Susan Folkman (Folkman and Lazarus, 1980; Lazarus and Folkman, 1984), for instance, in Kahn *et al.* (1964) and Mechanic (1962). We apply this clustering in our work because we believe the difference between these two reaction groups is key when considering how individuals face the challenges encountered abroad. Indeed, research has shown that, as a group, problem-focused approaches are more beneficial abroad than emotion-focused reactions (Stahl and Caligiuri, 2005). In fact, for expatriates facing novelty, challenges, difficulties and possibly stress (Andresen and Arnetz, 1999), dedicating effort to problem solving is likely to have different outcomes than focusing on the emotions generated by the issues and trying to soothe them. However, we argue that this classification is insufficient and needs to be complemented in two ways based on previous research (Duhachek, 2005; Roussi *et al.*, 2007) to shed much-needed light on the antecedents of expatriate coping. First, the highly diverse nature of emotion-focused coping strategies—some of which are practically in opposition (e.g. acceptance and denial)—calls for the application of a further grouping of emotion-focused mechanisms. Emotion-focused coping responses include engagement reactions, such as positive reappraisal or acceptance, and disengagement reactions, such as denial or behavioral disengagement (Roussi *et al.*, 2007). Research has consequently also suggested clustering coping strategies based on whether they are engagement or disengagement reactions (Connor-Smith and Flachsbart, 2007). Engagement coping responses are reactions directed toward the source of stress and the associated emotions, whereas disengagement coping (or avoidance) is the process of distancing oneself from the source of stress (Connor-Smith and Flachsbart, 2007). A theoretical distinction between emotion-focused engagement and disengagement reactions is relevant to expatriates who leave their home environments and enter new environments in which they can engage and attempt to adapt or behaviorally and mentally disengage by creating distance and refusing to adjust to their new world.

Second, research on gender shows that, at least in Western societies, women are more inclined than men to seek support, use support more, and express their emotions more openly as coping responses (Brody and Hall, 2008). While these coping mechanisms are closely related and could be grouped around the ideas of expression and support, they belong to different groups of the traditional clusters (use of instrumental support, support to solve problems, is a problem-based coping strategy, while the expression of emotions and the use of emotional support are emotion-focused). Therefore, to be as informative (and accurate) as possible, we further develop our coping categorization with a group called "expressive use of support" (which includes the reactions to emotional expressions and the use of support), which has been advanced by previous research (Duhachek, 2005).

We examine 14 of the 15 coping strategies theoretically evidenced by Carver and Scheier (1994, religious coping is excluded). We cluster them into four theoretically meaningful groups, as presented in Table 1. Problem-focused coping includes four coping strategies: active coping, planning, restraint and suppression of competing activities. Expressive

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Coping dimensions	Coping subdimensions	Coping strategies	Item examples	Cronbach's alphas
Problem-focused Coping Strategies		*Active coping*: problem-solving action	I take additional action to solve the problem	0.73
		Planning: development of plans or strategies	I think hard about what steps to take	0.80
		Restraint: waiting before acting too quickly	I make sure not to make matters worse by acting too soon	3-item scale used in the study: 0.61
		Suppression of competing activities: a focus on the problem and avoidance of distraction	I keep myself from getting distracted by other thoughts or activities	3-item scale used in the study: 0.70
Expressive Support-seeking Coping Strategies		*Focus on and venting of emotions*: emphasis on and expression of emotions	I let my feelings out	0.79
		Use of emotional social support: seeking of understanding and empathy for one's feelings	I talk to someone about how I feel	0.86
		Use of instrumental social support: seeking of help, advice, and information from others	I try to get advice from someone about what to do	0.78
Emotion-focused Coping Strategies	Engagement	*Acceptance*: psychological accommodation to the situation and the process of learning to live with it	I learn to live with it	0.69
		Humor: consideration of and focus on the funny side of the situation	I laugh about the situation	0.87
		Positive reinterpretation and growth: reappraisal and re-evaluation of the situation to see its good side; infusion of the situation with positive meaning	I look for something good in what is happening	0.69
	Disengagement	*Behavioral disengagement*: termination or limitation of efforts to solve the problem	I just give up trying to reach my goal	0.67
		Denial: attempt to forget or deny a problem	I pretend that it has not truly happened	3-item scale used in the study: 0.72
		Mental disengagement: attempt to remove the attention from the source of stress	I daydream about things other than this	0.47
		Substance use: consumption of alcohol or drugs	I use alcohol or drugs to help me get through it	0.94

Note(s): *Coping strategies from Carver and colleagues (e.g. Brissette *et al.*, 2002)

Table1. Coping strategy classification for studying the influence of expatriates' age, gender, and initiation of expatriation*

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support-seeking encompasses three response types: focus on and venting of emotions, use of emotional social support and use of instrumental social support. Emotion-focused engagement-coping responses are acceptance, humor and positive reinterpretation and growth. Finally, the emotion-focused disengagement-coping mechanisms studied are behavioral disengagement, mental disengagement, denial and substance use.

Seminal research on the antecedents of expatriate coping provides compelling findings. Some studies have suggested that home and host countries as well as cultural distance between them affect coping reactions (Selmer, 1999b). Expatriates from a country with a greater cultural distance from the host country may display more problem-focused coping and less emotion-focused coping than expatriates from less culturally distant countries (Selmer, 2002). Some attitudes and beliefs affect coping reactions; for instance, a perceived inability to adjust can lead individuals to display less patience and tolerance and to employ less responsible problem solving (Selmer, 2001). Moreover, recent works have provided qualitative information on the coping strategies used by expatriates in dangerous locations (Faeth and Kittler, 2017) and even of female military personnel assigned to war zones (Fisher *et al.*, 2015).

Age

Age plays a role in the coping process and affects appraisals and coping choices (e.g. Blanchard-Fields *et al.*, 1995; Monteiro *et al.*, 2014). We apply the transactional theory of stress and coping to examine the role of age in expatriation (Lazarus and Folkman, 1984). Older individuals appear to have developed resources—particularly related to a better ability to manage their emotions—that are likely to limit their disengagement reactions and to allow them to more easily adopt some problem-focused and engagement reactions. Specifically, socioemotional selectivity theory advances that goals and priorities evolve during life and that emotional regulation goals steadily gain importance (Cartensen, 1991; Ng and Feldman, 2010). In other words, age affects emotions, particularly emotion management. Emotional regulation improves with age: older people control their impulses better (Diehl *et al.*, 1996) and, generally, are better able to control their emotions than younger people (Gross *et al.*, 1997; Labouvie-Vief *et al.*, 1989). They experience fewer negative emotions and overcome them (shift to a neutral emotional state) more quickly (Cartensen *et al.*, 2000; Gross *et al.*, 1997). These differences in emotion management are also related to differences in reactions. Because of their better control of emotions, older people are less likely to display neurotic and immature responses, such as aggressiveness, hostility (Diehl *et al.*, 1996), escapism and avoidance (Aldwin, 1991; McCrae, 1982). Older people also seem more likely to have positive appraisals and reframe situations (Diehl *et al.*, 1996; Monteiro *et al.*, 2014). Such tendencies also facilitate problem-solving reactions (Monteiro *et al.*, 2014). In summary, older people seem to have developed resources—particularly better control of their emotions—that allow them to better handle challenges (Cartensen *et al.*, 2000). These resources help them display fewer disengagement reactions and more engagement and problem-focused responses than their younger counterparts.

These conclusions are likely to hold in expatriation, where there is a risk of displaying aggressiveness and hostility toward host country nationals (Doucet and Jehn, 1997) but also of disengagement reactions of escapism and avoidance (e.g. attempting to limit embeddedness and interactions in the host environment and, when possible, to return—either physically or psychologically—to the home country (Selmer, 1999b; Stahl and Caligiuri, 2005)). Two research articles focused on the role of age in expatriation. One study showed that cultural differences in age affect how expatriates are perceived (Selmer *et al.*, 2009), and the other showed that age moderates the impact of emotional intelligence (Wechtler *et al.*, 2015). The latter provides seminal arguments for the relevance of socioemotional selectivity theory in expatriation and advances the notion that age acts as a

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catalyst for emotional intelligence. Therefore, in international settings and based on socioemotional selectivity theory, we expect older expatriates to have more resources than their younger counterparts, particularly the ability to better manage emotions to facilitate the adoption of problem-focused coping strategies and emotion-focused engagement strategies while limiting the use of emotion-focused disengagement-coping responses.

H1. Older expatriates are more likely than younger expatriates to apply problem-focused coping strategies: a) active coping, b) planning, c) restraint, and d) suppression of competing activities.

H2. Older expatriates are more likely than younger expatriates to apply emotion-focused engagement coping strategies: a) acceptance, b) humor, and c) positive reinterpretation.

H3. Older expatriates are less likely than younger expatriates to apply emotion-focused disengagement coping strategies: a) denial, b) behavioral disengagement, c) mental disengagement, and d) substance use.

Gender

To understand how gender shapes expatriate coping behaviors, we apply socialization and role theory (within the general transactional theory of stress and coping framework from the paper (Tharenou, 2008)). Socialization and role theory proposes that individuals are conditioned through socialization to internalize divergent social expectations and norms and to adopt certain roles, behaviors, and attitudes (Eagly *et al*., 2000). Socialization and norms internalized by women and men affect the way they see situations and their coping choices (their primary and secondary appraisals, how situations are appraised and their coping choices (Lazarus and Folkman, 1984)). Women are socialized to express their emotions, grant importance to others, and display reactions of affiliation, whereas men are socialized to be assertive and autonomous and follow their goals (Almeida and Kessler, 1998; Barnett *et al*., 1987). This phenomenon shapes the resources available to men and women to assess any hardships that they may face and influences their coping choices: women are more likely than men to seek and use social support, reappraise situations positively, display acceptance and vent their emotions (Nolen-Hoeksema and Aldao, 2011; Tamres *et al*., 2002). They are more affiliative, display more engagement reactions and emotional expressions and use more support.

Gender discrepancies related to expatriation have been evidenced (e.g. Tharenou, 2009), and the differences mentioned above should apply to expatriates. For instance, Myers and Pringle (2005) showed that connecting with other people (an engagement reaction) was more important for female SIEs than it was for male SIEs. Tung (2004) suggested that to cope with expatriation hardships, female expatriates communicated more with people back home, whereas male expatriates drank alcohol and played sports more. More generally, female expatriates appear better at developing relationships (Halsberger, 2010). Taken together, these findings suggest that female expatriates are more likely to use more expressive social support coping strategies (use of emotional social support, use of instrumental social support, and venting of emotions) and more emotion-focused engagement coping strategies (acceptance, humor, and positive reinterpretation) than male expatriates.

H4. Female expatriates are more likely than male expatriates to apply expressive support-seeking coping strategies: a) use of emotional social support, b) use of instrumental social support, and c) venting of emotions.

H5. Female expatriates are more likely than male expatriates to apply emotion-focused engagement coping strategies: a) acceptance, b) humor, and c) positive reinterpretation.

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Expatriation type

SIEs and AEs have different profiles, perspectives on expatriation, and resources that are apt to influence their appraisal and response to expatriation hurdles. Indeed, according to the transactional theory of stress, personal characteristics shape problem appraisal and the consequent use of different coping strategies (Lazarus and Folkman, 1984). SIEs include a wide variety of profiles. To manage such diversity, we apply an ideal-type approach (Weber, 1978) and focus on some key characteristics of SIEs and AEs that are directly derived from the origin of the expatriation (the individual or the organization). However, some SIEs (and possibly AEs) may fall far from these generalities and appear as exceptions. We believe that three core differences between SIEs and AEs are likely to influence coping resources and appraisals and, thus, coping choices: the initiation of the decision to expatriate, the choice of the host country, and the level of organizational support. First, by definition, AEs are sent abroad by their company to, in one way or another, respond to organizational needs, whereas for SIEs, the move abroad is their decision that is made outside organizational boundaries. Second, the corollary of the first difference is that AEs may be more or less motivated to make the move, whereas SIEs are likely to be strongly motivated (Doherty *et al.*, 2011; Suutari *et al.*, 2018a)—they will have deliberately selected the host country themselves and applied for a job without organizational support. Third, organizational support concerns more than just the move. AEs are employed by multinational enterprises (MNEs) and usually receive generous support packages, including major increases in financial rewards as well as various types of instrumental support in terms of transport, housing, schooling for any children, and a specialist support group in the human resource management department. SIEs may or may not work for an MNE; however, even when they do, they benefit from none of these forms of support and, thus, are much more likely to have to handle problems themselves (Suutari and Brewster, 2000; Vance, 2005).

SIEs' specific interests in expatriating and in the particular job or host country are likely to imply an interest in host nationals and cross-cultural experience (Doherty, 2013) and therefore engagement reactions. This line of thought is consistent with previous studies showing that some SIEs speak the local language better than AEs (Froese and Peltokorpi, 2013) and are better adjusted to interacting with locals (Hechanova *et al.*, 2003). Thus, when facing issues, SIEs should be more willing and able to gather local social support. They should also have a larger audience to which they can express their emotions. Because their salaries are not enormously higher than those of local workers, locals may be more sympathetic to them (Oltra *et al.*, 2013). In summary, SIEs may benefit more than AEs from two resource types—motivation (regarding expatriation and the host country) and support from locals—while AEs receive more instrumental support from their organization than SIEs. We believe that SIE motivation leads them to display more engagement responses to cope and that the additional support received from locals facilitates their use of emotional support and makes them better able to express their emotions. We also argue that both expatriate types gather significant amounts of instrumental support but by different means and from different sources—SIEs from their embeddedness in the country and AEs from their company support. The multiple forms of assistance that are available from AE organizations could be balanced by SIEs' access to instrumental social support based on their motivation regarding and embeddedness in the country.

H6. Self-initiated expatriates are more likely than are assigned expatriates to use the following expressive support-seeking coping strategies: a) emotional social support and b) venting of emotions.

H7. Self-initiated expatriates are more likely than are assigned expatriates to apply emotion-focused engagement-coping strategies: a) acceptance, b) humor, and c) positive reinterpretation.

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Method

Data collection

Four multinational companies from the electronic, retail, mobility, and luxury goods industries headquartered in Switzerland and France participated in this study. The authors used their personal and professional networks to supplement the data and ensure a significant representation of self-initiated and female expatriates. In total, 1,296 expatriates were sampled. Four hundred forty-eight completed questionnaires were received for a 35% response rate. Fifty-three percent of the data came from multinationals, and 47% came from various networks. The participants worked in 65 different host countries on all continents. The most represented host countries were Singapore (11%), the United States (10%), France (8%), China (6%), the United Kingdom (6%), and Germany (6%). Forty-three different nationalities were present in the sample—the most strongly represented being France (62%). Twenty-five percent of the participants were women, and 38% were SIEs. They had an average age of 37 years.

Measures

Table 2 displays the means, standard deviations, correlations, and internal consistency reliabilities of the study variables.

Independent variables. Expatriates were asked to indicate their age, gender, and whether they were sent by their company to their current host country.

Dependent variables. Coping. Fourteen of the 15 subscales from the COPE Inventory were used to assess expatriate coping. This scale was developed by Charles Carver and his colleagues (Brissette *et al.*, 2002; Carver and Scheier, 1994; Carver *et al.*, 1989). Each coping strategy was initially measured through four items. The responses ranged from 1 (*I did not do this at all*) to 4 (*I did this a lot*). In line with previous studies (e.g. Brissette *et al.*, 2002), the mental disengagement subscale showed inconsistent internal reliability (0.47) and, consequently, was dropped. Moreover, one item had to be removed from three subscales—restraint, suppression of competing activities, and denial—because of low internal reliability. Following the suggestion from Chen and Shaffer (2018) to provide a fine-grained examination of the diversity of coping responses, we ordered but did not factorize the coping strategies into higher-order groups. This approach suited the data because only three correlations between the coping strategies exceeded 0.50, and the majority were lower than 0.20.

Control variables. We controlled for variables likely to influence individual coping. Seminal research on expatriate coping suggests that the home country affects coping responses (Selmer, 2002). Sixty-two percent of the participants were French; therefore, we controlled for French origin. Moreover, previous experience of expatriation may affect reactions abroad (Wurtz, 2018). Because previous expatriation experience is likely to be correlated with age, we controlled for experience to more accurately isolate the influence of age *per se*.

Common method bias and multicollinearity

All of the data came from the same source (the questionnaire completed by expatriates), but the independent variables (age, gender, and type of expatriation) were based on factual information and, thus, were unlikely to be subject to common method variance (CMV; Chang *et al.*, 2010). In addition, we tested our predictions using three independent variables, two control variables, and 13 dependent variables. Such complexity is likely to decrease CMV (Chang *et al.*, 2010). Additionally, Harman's one-factor test was used to test for CMV. If CMV were a serious problem in the study, a single factor would emerge from a factor analysis or one general factor to account for most of the covariance in the database (Podsakoff and Organ, 1986). We performed a factor analysis on all the items, extracting eight factors with eigenvalues greater than one.

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Table 2.
Means, standard deviations, alpha coefficients, and correlations of the variables

	Variable	*M*	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1	French Nationality	0.62	0.49																		
2	Expatriation Experience	2.82	1.20	0.09																	
3	Age	36.92	9.80	−0.15	0.29																
4	Gender	0.25	0.43	−0.06	−0.17	−0.35															
5	Self-Initiated/Assigned Expatriation	0.38	0.49	−0.04	−0.24	−0.41	0.38														
6	Active Coping	2.99	0.65	0.06	0.11	0.14	−0.04	−0.08	(0.73)												
7	Planning	3.08	0.69	−0.01	0.16	0.16	−0.01	−0.08	0.71	(0.80)											
8	Restraint	2.55	0.68	0.02	0.05	0.14	−0.09	−0.10	0.30	0.37	(0.61)										
9	Suppression of Competing Activities	2.43	0.73	0.08	−0.03	0.04	−0.08	−0.10	0.48	0.45	0.24	(0.70)									
10	Focus on and Venting of Emotions	2.11	0.72	0.08	−0.18	−0.10	0.29	0.19	0.08	0.08	0.02	0.15	(0.79)								
11	Use of Emotional Social Support	2.49	0.81	0.12	−0.12	−0.22	0.25	0.21	0.18	0.22	0.13	0.19	0.56	(0.86)							
12	Use of Instrumental Social Support	2.62	0.75	0.13	−0.03	−0.07	0.16	0.11	0.34	0.37	0.21	0.26	0.37	0.65	(0.78)						
13	Acceptance	2.60	0.71	0.11	−0.06	−0.05	0.12	0.10	0.22	0.17	0.11	0.20	0.21	0.26	0.16	(0.69)					
14	Humor	1.90	0.77	0.07	−0.01	−0.12	0.04	0.11	0.09	0.05	0.01	0.04	0.07	0.18	0.15	0.23	(0.87)				
15	Positive Reinterpretation and Growth	2.98	0.60	0.03	0.01	0.03	0.13	0.04	0.41	0.47	0.25	0.32	0.16	0.29	0.38	0.28	0.24	(0.69)			
16	Behavioral Disengagement	1.47	0.55	0.14	−0.01	−0.04	−0.02	0.02	−0.15	−0.16	0.08	0.04	0.22	0.08	0.13	0.13	0.19	0.08	(0.67)		
17	Denial	1.27	0.48	0.05	−0.07	0.02	−0.10	0.02	−0.16	−0.10	0.04	0.04	0.10	−0.01	0.01	−0.02	0.17	−0.03	0.40	(0.72)	
18	Substance Use	1.14	0.40	0.01	0.01	−0.15	0.02	0.10	−0.11	−0.10	0.03	−0.02	0.08	0.06	0.01	0.05	0.17	−0.09	0.20	0.20	(0.94)

Note(s): $N = 448$. All correlations with absolute values larger than 0.08 are significant at the $p < 0.05$ level, and all correlations larger than 0.11 are significant at the $p < 0.01$ level

Internal consistency reliabilities are in parentheses on the diagonal. French nationality (not French = 0, French = 1), gender (0 = male, 1 = female), expatriation initiation (0 = assigned expatriate, 1 = self-initiated expatriate)

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Furthermore, no general factor was apparent in the unrotated factor structure, with the first factor accounting for less than 20% of the variance. Finally, the variance inflation factors were computed and were all below 1.4, indicating that multicollinearity was not an issue in our analyses (Hair *et al.*, 2006).

Findings

The respective hypothesis tests are reported in Tables 3–6. However, due to a lack of information, these hypotheses were not controlled for factors such as organizational characteristics (such as industry or age of establishment), and nonresponse bias could not be

Table 3. Regressions predicting problem-focused coping (Hypothesis 1)

	Dependent variables: Problem-focused coping strategies			
Variable	Active coping	Planning	Restraint	Suppression of competing activities
French Nationality	0.07	0.01	0.04	0.08†
Expatriation Experience	0.06	0.12*	−0.01	−0.08
Age	0.14*	0.15**	0.12*	0.03
Gender	0.03	0.07	−0.03	−0.04
Self-initiated/Assigned Expatriation	−0.03	−0.01	−0.04	−0.09
R	0.173	0.207	0.158	0.149
R^2	0.030	0.043	0.025	0.022

Note(s): $N = 448$. ***$p < 0.001$. **$p < 0.01$. *$p < 0.05$. †$p < 0.10$

Table 4. Regressions predicting expressive support-seeking coping (Hypotheses 4 and 6)

	Dependent variables: Expressive support-seeking coping strategies		
Variable	Focus on and venting of emotions	Use of emotional social support	Use of instrumental support
French Nationality	0.12**	0.13**	0.15**
Expatriation Experience	−0.15**	−0.05	−0.03
Age	0.09†	−0.08	0.04
Gender	0.27***	0.19***	0.15**
Self-initiated/Assigned Expatriation	0.09†	0.11*	0.07
R	0.349	0.327	0.220
R^2	0.122	0.107	0.049

Note(s): $N = 448$. ***$p < 0.001$. **$p < 0.01$. *$p < 0.05$. †$p < 0.10$

Table 5. Regressions predicting emotion-focused engagement coping (Hypotheses 2, 5, and 7)

	Dependent variables: Emotion-focused engagement coping strategies		
Variable	Acceptance	Humor	Positive reinterpretation and growth
French Nationality	0.13**	0.05	0.06
Expatriation Experience	−0.05	0.03	0.01
Age	0.05	−0.09†	0.11†
Gender	0.10*	−0.02	0.16**
Self-initiated/Assigned Expatriation	0.08	0.09	0.03
R	0.184	0.145	0.165
R^2	0.034	0.021	0.027

Note(s): $N = 448$. ***$p < 0.001$. **$p < 0.01$. *$p < 0.05$. †$p < 0.10$

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assessed. As expected based on hypotheses 1a, b, c and d, age was positively related to all problem-based coping responses except for suppression of competing activities, namely, active coping ($\beta = 0.14$; $p < 0.05$), planning ($\beta = 0.15$; $p < 0.01$), and restraint ($\beta = 0.12$; $p < 0.05$). Therefore, hypotheses 1a, b and c are supported, while hypothesis d is not. Hypotheses 2a, b and c proposed that age is positively related to emotion-focused engagement coping. The positive reinterpretation and growth coping response ($\beta = 0.11$; $p < 0.10$) was only marginally related to age, acceptance was not, and humor was marginally *negatively* related to age ($\beta = -0.09$; $p < 0.10$). Hence, hypotheses 2a, b and c are not supported. In hypotheses 3a, b, c and d, we proposed that age is negatively correlated with emotion-focused disengagement coping. Although age was not negatively correlated with denial and behavioral disengagement, it was significantly and negatively related to substance use ($\beta = -0.17$; $p < 0.01$). Therefore, while hypotheses 3a and b are not supported (and hypothesis 3c could not be tested because of lack of scale reliability), hypothesis 3d is supported.

As expected based on hypotheses 4a, b and c, gender was related to expressive support seeking. Female expatriates reported more of a focus on and venting of emotions ($\beta = 0.27$; $p < 0.001$), more use of emotional support ($\beta = 0.19$; $p < 0.01$), and more use of instrumental support ($\beta = 0.15$; $p < 0.01$). Therefore, hypotheses 4a, b and c are supported. Hypotheses 5a, b and c predicted that gender is related to emotion-focused engagement coping. Female expatriates reported engaging in acceptance ($\beta = 0.10$; $p < 0.05$) and positive reinterpretation and growth ($\beta = 0.16$; $p < 0.01$) more than male expatriates. However, no significant gender difference was found regarding humor. Hypotheses 5a and c are consequently supported, and hypothesis 5b is not. Next, SIEs reported more use of emotional social support ($\beta = 0.11$; $p < 0.05$) and marginally more of a focus on and venting of emotions ($\beta = 0.09$; $p < 0.10$). Therefore, hypothesis 6a is supported, and hypothesis 6b is not. Finally, the variable SIE/AE was not significantly related to any emotion-focused engagement-coping responses. Hypothesis 7 is consequently not supported. All of the results are shown in Table 7.

Discussion

This study makes several contributions to the literature on expatriation. It casts new light on the roles of gender, age and expatriation type and offers new insights on various groups of expatriates. We applied the transactional theory of stress and coping to examine how the expatriate categories cope with expatriation difficulties. We provide theoretical and empirical support for interpersonal variations in expatriate coping. Different expatriate categories have different profiles, internal and external resources and demands that lead to different coping reactions. We show that old and young expatriates, females and males, and SIEs and AEs react to and cope with expatriation hardships differently to a certain extent. Expatriate coping cognitions and behaviors depend on age, gender, and expatriation type. This work

Table 6.
Regressions predicting emotion-focused disengagement coping (Hypothesis 3)

Variable	Dependent variables: Emotion-focused disengagement coping strategies		
	Behavioral disengagement	Denial	Substance use
French Nationality	0.13**	0.06	−0.03
Expatriation Experience	−0.02	−0.09†	0.07
Age	−0.02	0.04	−0.17**
Gender	−0.03	−0.13*	−0.06
Self-initiated/Assigned Expatriation	0.03	0.07	0.07
R	0.142	0.157	0.181
R^2	0.020	0.025	0.033

Note(s): $N = 448$. ***$p < 0.001$. **$p < 0.01$. *$p < 0.05$. †$p < 0.10$

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Variable	Problem-focused coping strategies				Expressive support-seeking coping strategies			Emotion-focused engagement coping strategies			Emotion-focused disengagement coping strategies		
	Active coping	Use of Instrumental support	Restraint	Suppression of competing activities	Focus on and venting of emotions	Use of emotional social support	Use of instrumental support	Acceptance	Humor	Positive reinterpretation and growth	Behavioral disengagement	Denial	Substance use
Age	H1 +	+	+	0				H2 0	0	0	H3 0	0	–
Gender (Female)					H4 +	+	+	H5 +	0	+			
Expatriation Type (Self-initiated)					H6 0	+	0	H7 0	0	0			

Note(s): +: significant positive relationship, –: significant negative relationship, 0: no significant relationship. Only the cases for which hypotheses have been developed are filled in

Table 7.
Summary of the results

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contributes to a more fine-grained understanding of expatriation. It answers the repeated calls for using theoretically meaningful categories (Reiche *et al.*, 2019) and studying different expatriate types (Shaffer *et al.*, 2012). Moreover, it examines coping reactions at a granular level, advancing knowledge on the use of 13 expatriation coping strategies. By doing so, it offers a deep dive into expatriate actions and cognitions.

First, our study extends previous research on the role of expatriate age to establish that age matters in expatriation; it has an important influence on expatriates' behaviors and thoughts. Although almost absent from the expatriate literature (except as a control variable), age affects expatriation in meaningful ways. This work shows that age shapes the coping mechanisms displayed in expatriation: consistent with our conceptualization, older expatriates apply more problem-focused coping (active coping, planning and restraint) and consume fewer substances to cope. They also display more beneficial coping schemes than do younger expatriates. The ability of older professionals to be less affected by negative emotions is an asset abroad, where situations can become emotional for some (Bird and Oddou, 2008). The abilities to cool down faster and be less emotionally affected by difficulties are helpful when actively trying to solve problems faced abroad. Individuals less able to do so are at risk of succumbing to the various challenges experienced abroad, possibly leading to overreaction, decreased focus on adjustment, and possibly extreme reactions (e.g. leaving the assignment early, having a breakdown; Foyle *et al.*, 1998).

In terms of escapism and disengagement reactions, we observed that age limits substance use abroad but not the other assessed disengagement reactions (denial and behavioral disengagement; mental disengagement could not be properly assessed because the scale had low reliability). Younger expatriates are not less aware of their problems than are older expatriates, and they do not deny their challenges. The differences are more related to the strategies that the two groups use to tackle the challenges. This finding is at odds with some domestic findings (Aldwin, 1991; McCrae, 1982). The contradiction might reveal that this discrepancy is context specific.

Our findings shed light on the positive relationship between age and professional adjustment evidenced in a meta-analysis (Hechanova *et al.*, 2003). Taken together with Stahl and Caligiuri's (2005) work establishing that problem-focused coping facilitates adjustment, the present study suggests that older expatriates' greater use of problem-focused coping mechanisms explains (at least partly) why they are better adjusted to their professional situations abroad.

We suggest that the positive effect of age on expatriation has distorted the results of some analyses of the role of international experience (e.g. Bhaskar-Shrinivas *et al.*, 2005). Although age and international experience show strong correlations (the older an individual is, the more likely he or she is to have international experience or to have more international experience), these two factors can produce different effects (Wechtler *et al.*, 2015). Indeed, post hoc analyses suggest that international experience might facilitate planning and limit the focus on and venting of emotions (see the regressions in Tables 3 and 4). Therefore, although age and experience seem to have similar effects on planning, these effects could be at odds regarding the focus on and venting of emotions (with a significant and negative influence of international experience on the focus on and venting of emotions but a marginally positive effect of age). Another illustration of the conflicting effects of these two factors is the example of substance use abroad. Although age limits the risks of using alcohol or drugs to face expatriation challenges, the expatriation experience positively moderates the stress–substance use relationship abroad (Wurtz, 2018). Age is a protective factor, whereas international experience is a risk factor (when expatriates are stressed) for substance use abroad: the expatriation experience increases the chance of taking drugs or alcohol to handle expatriation hardships (during stressful times), while age reduces the likelihood of such use. Therefore, while expatriation experience and age are strongly correlated, they seem to have

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different effects on substance use coping. Generally, age needs to be taken into consideration when studying the impact of international experiences.

Second, we advance an analytical framework that is instrumental in determining the influence of gender on expatriation. It informs the discussion on how females and males experience expatriation and adjust to their host countries by providing theoretical and empirical insights showing that females and males cope differently with expatriation hardships (to a certain extent). We show that women display more expressive support-seeking and emotion-focused engagement-coping reactions (except for humor). This finding sheds some light on the role of gender in adjustment. Although this study does not specifically examine the impact of coping on adjustment, it nonetheless outlines differences in reactions that are likely to play a role in the adjustment process (Stahl and Caligiuri, 2005). Notably, this work suggests that female expatriates use support more than male expatriates, which is consistent with the evidence from Halsberger (2010) that women build relationships more easily than men and are more likely to positively reappraise their experience. Whereas loss of social networks and isolation are difficulties or risks of expatriation, the ability to easily use social support is an asset abroad (Anderzén and Arnetz, 1997). This finding contributes to the explanation for why female expatriates are better at handling isolation abroad (Tung, 2004). To explain gender differences abroad, previous research advanced other factors abroad, such as the prevalence of traditional gender roles in some countries (Caligiuri and Tung, 1999). We offer a complementary explanation of these differences. While host country norms can explain why, in some cases, expatriation can be more difficult for females, the coping approach reveals that they might be better able to cope in other cases, and they possess key assets for the international experience.

Moreover, appraisal plays a key role in the coping process (Lazarus and Folkman, 1984). Positively appraising (or reappraising) potentially stressful situations (as challenges rather than as threats or losses) has been shown to be beneficial in shaping stress and coping processes and leading to more desirable outcomes (Lazarus and Folkman, 1984). Being able to make positive appraisals or reappraisals is also an asset when abroad. Thus, women have advantages as expatriates. However, we did not find evidence for more use of humor to cope with expatriation hardships. Our conceptualization considered humor an emotion-focused engagement response (in line, for instance, with Connor–Smith and Flachsbart (2007)). However, it may not function, at least abroad, in the same way as other emotion-focused engagement strategies (analyses of the role of age also displayed possibly surprising results although only marginally significant: age was marginally positively related to positive reappraisal but negatively related to humor). This topic may warrant further investigation.

Third, this work provides a new theoretical perspective on a highly researched topic—SIEs vs. AEs—and advances this research by evidencing behavioral differences in how they cope with expatriation challenges. While research has shown that SIEs and AEs diverge in various dimensions (Peltokorpi and Froese, 2009; Suutari *et al.*, 2018a), we established that they also vary in the way they cope. This finding contributes to a more complete picture of SIEs and AEs, extending our psychological and behavioral pictures of these expatriate types. SIEs and AEs have access to different resources (in terms of networks, language skills, and company support) and have different perspectives on expatriation, which can generate different appraisals of challenges and, hence, abilities to cope. In line with our theorizing, SIEs use emotional social support more than do AEs. These results are relatively robust because they were controlled for gender and age, which somewhat overlap with the SIE/AE distribution. This difference in the SIE and AE coping schemes is likely to be consequential. SIEs' motivation, ability, and related networks provide them with access to more emotional support and thus reduce their emotional isolation relative to that of AEs. Indeed, the resources from which SIEs benefit and their consequent higher level of use of emotional

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support are likely to be particularly impactful since a major threat for expatriates is loneliness or isolation, related to the loss of (or distancing from) social networks back home.

Interestingly, the substantial instrumental support often provided by organizations to AEs does not seem to make AEs better able than SIEs to cope with the hardships of expatriation. However, these resources appear to be needed to offset the previously mentioned SIE resources. This ability of SIEs to secure significant levels of instrumental and emotional support by themselves might also help explain why SIEs have longer careers abroad than do AEs (Suutari and Brewster, 2000; Doherty *et al.*, 2011). SIEs' coping schemes could explain their greater ability and willingness to have more/longer international experiences, particularly their ability to gather different types of support (and, relatedly, rebuild networks) can limit their expatriation isolation and loneliness issues, possibly causing them to enjoy their international experiences more.

We did not find evidence for a more engagement-oriented coping scheme (in addition to the use of emotional support) for SIEs vs. AEs. This (non)finding suggests that expatriation origin does not affect such engagement reactions and that AEs, even if they are less motivated regarding the move and the host country than SIEs, do not display less acceptance and positive reappraisal than their SIE counterparts. This result might be explained by other motivation sources, such as the job (Cerdin, 2013). It could also be explained by strong company support (various monetary and nonmonetary benefits; Bonache, 2006) for AEs that may help them accept and see the positive in their situations. The high salaries, very attractive material conditions (e.g. housing, cars, tickets to return home, personal helpers in some countries) may balance out SIEs' stronger initial motivation.

Practical implications

Some ideas can be extrapolated from this work to enable human resource management professionals (and line managers) to better support expatriates. In general, this work provides evidence of interindividual variations in the individual experience of expatriation—actions and cognitions to cope with the challenges encountered, which in turn calls for the tailoring of expatriate support. This customization could, among other things, use the categories emphasized in this work. For example, special attention and support could be provided to populations that find it more difficult to cope, such as younger expatriates. Younger expatriates might benefit from interventions aimed at helping them better control their emotions. Various techniques could be instrumental, such as yoga, mindfulness, or even offering professional psychological help. Moreover, activities such as coaching or training could help expatriates broaden their repertoire of coping strategies and use coping strategies that they may otherwise be less prone to use (such as problem-based coping). For instance, young expatriates (and others) could benefit from training or coaching that would (1) present and discuss the specific problems that could be faced in the host location and (2) provide advice on how to solve these problems. Relatedly, multinationals advertise opportunities to work abroad to attract young talent. Failure to ensure that these experiences unfold successfully might backfire and harm company image and recruiting power. This work identifies the risks regarding young people's expatriate experiences (their coping schemes are possibly less beneficial/effective than those of older expatriates) and suggests that these risks can be offset with adequate training and support. Doing so will also help companies deliver on their marketing claims aimed at attracting young talent and ensure the success of foreign experiences for them.

Next, the evidence offers some clues that the substantial instrumental support provided to AEs may be needed to help them fare as well as SIEs. Generally, this research informs human resources managers on expatriate needs, behaviors, and cognitions. Such elements are useful to better support various expatriate types. Social support is key in expatriation (Andrezen and Arnetz, 1997), and while helping expatriates rebuild social networks is beneficial for most

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of them, this research shows that some groups are more in need of such help. Knowing, for instance, that it is less natural for men to use social support, i.e. to turn to others to help face expatriation hardships, might suggest that help should be provided to them so they can more easily build social relationships abroad. Training or coaching with advice on how to rebuild networks locally might be very helpful—particularly for assigned and male expatriates. This could include information on relevant associations, groups, and activities available locally and possibly help registering and joining. Indeed, some expatriates might find their morale and self-confidence affected by the novelty and challenges of the host country, and the intervention could go beyond providing information and stimulate expatriate motivation and confidence to join some of these groups and participate in some of these activities.

Limitations and future research

As with all research, this project has limitations. First, this work was based on cross-sectional data. However, the use of nonsubjective independent variables (gender, age and type of expatriation) has reduced many concerns, such as the direction of causality and CMV. Second, the influence of factors such as organizational characteristics and nonresponse bias could not be assessed. Third, further investigation of the context of each expatriate was beyond the scope of this research. However, context is important for coping (Lazarus and Folkman, 1984); for instance, research suggests that the source of stress (Faeth and Kittler, 2017) and host country characteristics (Selmer, 1999b) may affect coping. The specific sources of stress (beyond the general setting of expatriation) that expatriates face and cope with should be investigated. Sources of stress abroad can be related to the host location (e.g. crime and culture), work (e.g. challenging responsibilities and difficulty in handling work challenges), and relatives (e.g. partner not working, child-related issues, and health issues of parents). Do the differences that were evidenced in this research arise because different types of expatriates experience different hassles, different sources of stress, or different stressors or because they react differently to identical stressors? The salience and impact of stressors may vary among expatriates. Gender can affect the stressors that an expatriate may face. For instance, women seem to be more affected by family-related events, whereas men seem to be more affected by financial issues (Matud, 2004). Such gender differences in coping can also be generated by differences in access to resources. Women may have less access to support from locals in countries with traditional gender roles (Lazarova *et al.*, 2010). Furthermore, the problems experienced can, to a certain extent, change with age. For instance, issues regarding children's schooling may not affect most expatriates in the earliest and latest years of their careers. Issues related to parental illness or loss may be less common among younger expatriates. Similarly, an AE who is abroad mainly for career reasons is likely to experience professional and cultural stressors differently from an SIE who is highly motivated by the local culture (and less concerned about his or her career within the organization). Therefore, we encourage the investigation of interindividual variations in the sources of stress experienced during expatriation. Finally, comprehensive research is needed on the role of home–host countries and cultural distance in coping. Although limited research has focused on expatriate actions and reactions at a granular, intraindividual level (Molinsky, 2007), the outcomes of our work lead us to call for more expatriate coping research to strengthen our understanding of adjustment, well-being, and success abroad.

Conclusion

This work provides a fresh perspective on and new insights into classic topics (age, gender, expatriation experience, and assigned vs. self-initiated expatriation). Individuals react differently abroad. They have different resources and face different demands that lead to

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different coping reactions. The greater ability of older people to manage their emotions and the greater ability of female expatriates and SIEs to gather and use support are assets abroad. Because previous research proposed that these coping choices generally affect expatriation success, this work suggests a shift in the focus of expatriation research to a more granular examination of expatriates' reactions and thoughts abroad and their antecedents. Recognizing that individual repertoires of responses to expatriate challenges are bounded not only by the external context but also by expatriates' personal characteristics, such as age, gender, and type of expatriation, helps us better understand the coping processes of expatriates and should lead to further efforts to help expatriates expand and improve their repertoire of coping strategies.

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