

**A PSYCHO-EDUCATIONAL ANALYSIS OF THE CROSS-CULTURAL  
ADJUSTMENT EXPERIENCES OF EXPATRIATE SPOUSES**

by

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**DECLARATION**

I declare that '**A PSYCHO-EDUCATIONAL ANALYSIS OF THE CROSS-CULTURAL ADJUSTMENT EXPERIENCES OF EXPATRIATE SPOUSES**' is my own work and that all the resources that I have used or quoted have been indicated and acknowledged by means of complete references.

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Mrs B Muller

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Date

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## **ABSTRACT**

This study examines the expatriate spouses' cross-cultural adjustment to the host country. The cross-cultural adjustment experience of the expatriate spouse differs vastly from that of the expatriate. Literature was consulted to understand the cardinal role that the spouse portrays during an expatriate assignment and to highlight the importance of a well-adjusted spouse.

This study engaged in qualitative research methodology using five expatriate spouses residing in Rome, Italy. Spouses were from two different countries and represented different age groups. Data collection methods included interviews and a focus group session to gain an in-depth understanding of spouses' cross-cultural adjustment experiences.

Results showed that spouses arriving in the host country experienced a loss of identity. Identity in this study was divided into three categories namely personal, situational and social. Once spouses went through a period of identity reformation they were able to become well-adjusted spouses.

## **KEY TERMS**

Expatriate, expatriate spouse, expatriate assignment, expatriate failure, cross-cultural adjustment; host country; cultural novelty

## ACRONYMS AND ABBREVIATIONS

CINAHL	Cumulative Index to Nursing and Allied Health Literature
GRS	Global Relocation Services
MBA	Master's degree in Business Administration
n. p.	No page
SIT	Social Identity Theory
U.S.	United States
UNISA	University of South Africa

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## **CHAPTER 1: ORIENTATION TO THE STUDY**

### **1.1 BACKGROUND**

This chapter serves as an introduction to my research. It commences with an explanation on how I became aware of the problem and the analysis of the problem. It continues with the problem statement, the aims of the study as well as the research methods that were used. At the end of the chapter a clarification of the concepts is given.

As a South African, I have always loved travelling to different parts of the world. Nothing excites me more than travelling to a foreign country. Being overwhelmed by the things that you experience for the first time makes travelling addictive. Smelling, seeing, hearing and, of course, tasting is what makes travelling a feast for the senses. When I married my travelling-partner-in-crime in 2010, we decided to make it our mission to visit at least one new country every year. For three years we met our challenge, until, in 2013, a whole new travelling opportunity crossed our path. My husband was afforded the opportunity to work on a project in Rome, Italy. This implied that we would have to relocate to Rome for the duration of three years. We could not have been more excited to embark on our new adventure.

The company that was sending us to Rome required that, prior to our embarking on our expatriate assignment, we attend cultural awareness training. Both of us found this to be amusing as in our minds we were two well-seasoned travellers. After three insightful and challenging days of training, we realised that going on a three-year expatriate assignment is not the same as going on a three-week overseas holiday. We soon came to realise that our knowledge of expatriation was limited and that it was certainly a different ball game that we were dealing with. During the cultural awareness programme, previous expatriates made us aware of some of the challenges that we might face whilst being on an expatriate assignment. This motivated me to do research on the topic of expatriation. Shaffer and Harrison (2001:238) found that the spouse and family play an integral role in the adjustment process of the expatriate. The important role that the spouse portrays in the cross-cultural adjustment process especially caught my attention.

Living as an expatriate spouse in Rome, Italy, I witnessed first-hand what experiences an expatriate spouse may encounter. This usually took place at coffee club meetings. At these meetings, I often listened to expatriate spouses discuss the turmoil of emotions and uncertainty that they experience daily. Adjusting to a new country is a challenge, not only to the expatriate, but also to the spouse who has to support her husband and children in their adjustment. Most of the ladies found the cross-cultural adjustment to the host country very challenging and this led to my research topic.

Globalisation, an important phenomenon in international business in the 20<sup>th</sup> and the 21<sup>st</sup> centuries, has influenced organisations to search for competitive advantage opportunities and possibilities by expanding their business and business activities to other countries. Organisations are continuously using employee foreign assignments as a human resource strategy. One of the consequences for operating globally is the organisation's need for employees who are able and willing to work on international assignments with the requirement of emigrating for a specific period of time. These employees are called expatriates. A corporation has to deal with potential risks when sending out an expatriate since the expatriate is considered to be a primary stakeholder in affecting the achievement of organisational goals (Takeuchi, 2010:41).

A survey done by Cartus (2007:55) showed that about two-thirds of international expatriates are accompanied by a spouse, children, or both. Due to trends in international sojourns, attention to the impact this experience has on spouses and children in foreign countries, is imperative. The reasons for failed assignments are generally synonymous with the inability of the spouse and children to adjust to the host country. This inability to adjust consequently affects the expatriate to such an extent, that assignment failure seems inevitable. While much research has been undertaken on the adjustment experiences of expatriates, little research has gone into the analysis of the experiences of the spouse in the host country. Research from the spouses' perspective is therefore necessary because of the cardinal role these spouses fulfil during an assignment in the host country.

## **1.2 ANALYSIS OF THE PROBLEM**

Andreason (2008:383) suggested that the relocation experience of the expatriate and spouse may differ by varying degrees. In many ways, the cross-cultural adjustment of the expatriate spouse and children is more difficult than an expatriate faces. The

expatriate has to change his physical location, yet stays within the stability of the familiar organisational culture, which largely reflects the home country. The expatriate generally arrives at a new assignment with a defined role, a set of responsibilities inherent in the job they are taking, and an established organisational support system. The expatriate finds continuity in his work life, as well as a network of colleagues for support. For a large part of the day, during most of the week, the expatriate does not come into direct contact with the host culture. Hiltrop and Jansens (1995:45) stated that expatriate spouses often become more immersed in the culture than the expatriate employee. Also, spouses are generally more directly involved with the local environment on a daily basis and tend to have considerably different responsibilities than they did before the assignment. Isolated from family and friends and living in a foreign environment with different legal, political and social systems, the adjustment process for the spouse may be especially frustrating and stressful (Albright, Chu & Austin, 1993:62).

The spouse may be forced to give up a job and social life (Takeuchi, Yun & Tesluk, 2002:656). Kilgore and Shorrock (1991:273) were of the opinion that aspects of an international move may indeed be difficult for expatriate spouses. International labour restrictions and language barriers often prevent spouses from finding jobs or from being able to apply for jobs in their area of expertise. A recent report found that although 60% of spouses had been employed prior to relocation, only 12% of those spouses were employed during the international assignment (Brookfield Global Relocation Services, 2011:34). A recent qualitative study identified challenges such as long working hours of the expatriate employee, corresponding lack of family time, and disproportionate impact of normal life events such as illness in an international setting (Bikos, Çiftçi, Güneri, Demir, Sümer, Danielson & Bilgen, 2007:30). However, despite the suggestions that career or psycho-social issues may inhibit the satisfaction and psychological well-being of spouses in the international setting, there is little direct evidence of this in the literature.

Lazarova, Westman and Shaffer (2010:85) pointed out that the spouse may experience difficulties in adjusting to a new living environment including a new unfamiliar context and does not have a social network to lean on for support. As a result, several negative issues may arise like isolation, insecurity and stress particularly in the early periods of the assignment. Where the spouse has children,

additional challenges arise, such as the children's anxiety and uncertainty related to identity formation, break-up of friendships and disruption in schooling.

The conclusion from all of the above is:

- There is an increase in the number of expatriates taking their spouses and children on assignments;
- Expatriation is more difficult for the spouse and children than for the expatriate himself;
- An important reason for failure of assignments is the inability of the spouse and children to adjust to the host country; and
- More research, from the spouse's perspective, is necessary in order to understand the adjustments experiences of the spouse.

### **1.3 OVERVIEW OF LITERATURE**

Table 1.1 below shows that most research has been done from a human resource management point of view. Much of the research on international relocation has focused on identifying employees likely to be successful in international settings and determining the causes of early termination of assignments. The research has attempted to identify personality characteristics and factors of adjustment to the culture or workplace that might impact performance in the international setting. Findings about spouses tend to be based on surveys of employees or corporate managers, with spouses portrayed as "problems to be solved" (Tung, 1982:58; Black & Stephens, 1989:531; Ali, Van der Zee & Sanders, 2003:565). These studies offer few insights into actual experiences of expatriate spouses.

Table 1.1: Examples of some of the research done on expatriate spouses

<b>Title</b>	<b>Author(s) and Year</b>	<b>Journal</b>	<b>Objective</b>	<b>Methodology</b>	<b>Findings</b>
The other half of the picture.	Black, S. J. and Gregersen, H. B. (1991)	Journal of International Business Studies, 22, 461-477	To understand antecedents of expat spouse adjustment.	Questionnaire mail survey to 1500 American expatriates and their spouses, 321 returned.	Anticipatory adjustment (past experience, favourable pre-departure opinion, pre-departing training).
Forgotten partners of international assignments: Development and test of a model of spouse adjustment.	Shaffer, M. A. and Harrison, D. A. (2001).	Journal of Applied Psychology 86 (2), 238-254	The authors developed and tested a model of spouse adjustment to international assignments in a sequence of qualitative and quantitative investigations.	Semi- structured interviews to identify several factors effecting spouse adjustment, the model was then tested on 221 expat couples.	Shaffer and Harrison's Model:  Personal identity, Social identity, Situational identity
An examination of cross-over and spill-over effects of spousal and expatriate cross-cultural adjustment on expatriate outcomes.	Takeuchi, R., Yun, S. and Tesluk, P. E. (2002)	Journal of Applied Psychology, 87 (4), 655-666	To test cross-over and spill-over effects of spouse adjustment on expatriate adjustment.	Survey of Japanese expatriates, their spouses and their superiors and analysis using SEM.	Results confirmed both hypotheses regarding cross-over and spill-over effects.
Spousal perspectives of expatriate family adjustment.	Shah, D. and Lund, D. W. (2007)	The International Journal of Diversity in Organisations, Communities and Nations, 7 (2), 94-101	To explore the impact of expatriate family relocation on the expatriate and their work from the spouse's perspective.	Qualitative study of western expatriate family adjustment in non-western country assignments.	Results indicate that pre-departure and encounter phases were perceived by the spouses to be the most difficult for the families.
Managing global talent: solving the spousal adjustment problems.	Cole, N. D. (2011)	The International Journal of Human Resource Management, 22 (7), 1504-1530	To explore whether a change in employment status would affect spousal adjustment.	Qualitative data in the form of interviews. Quantitative cross-sectional design using questionnaires to gather data.	Results show that expatriate spouses who experience an interruption of employment have lower interactional adjustment than those who do not.

A key challenge in HRM: Adding new insight to existing expatriate spouse adjustment models.	Gupta, R., Banerjee, P. and Gaur, J. (2012)	The Qualitative Report, 17(88), 1-30.	To strengthen the existing knowledge about factors affecting the adjustment process of the trailing expatriate spouse.	Qualitative inquiry of 26 Indian spouses'. In-depth interviewing was the chosen research method.	Results showed that the decision making process of the spouse was a complex interaction of cognitive reasoning, psychological and cultural value factors.
The cross-cultural adjustment process of expatriate families in a multinational organization: a family systems theory perspective	Rosenbusch, K. and Cseh, K. (2012)	Human Resource Development International, 15 (1), 61-77	To examine whether there was a relationship between the expatriates' perceptions of the characteristics of family flexibility and the level of cross-cultural adjustment in different domains.	Quantitative data collected through a web-based survey and qualitative data through open ended descriptions of their experiences.	Family flexibility was found to have a statistically significant relationship with all of the cross-cultural adjustment domains for expatriates.
Psychological health of expatriate spouses: a neglected factor in international relocation.	Wiese, D. L.(2013)	Asian Journal of counselling, 20 (1) and (2), 1-31.	To clarify how primary constructs identified in the expatriate research and theories of voluntariness related to the psychological health of expatriate spouses living in Hong Kong.	Quantitative data collected through a web-based survey.	Psychological health appears to be a critical factor in whether individuals ultimately manage to cope with the challenges and whether they decide to stay in the international setting.

My research is done from a psycho-educational perspective. Van den Aardweg and Van den Aardweg (1993:77) defined educational psychology as ‘an applied branch of psychology which consists of psychological principles and techniques for the development of educational strategies and programmes’. The question that emerges is whether the body of scientific research with regard to the psychological adjustment experiences of expatriate spouses could not be utilised in a way to give researchers a better understanding of what these spouses experience. This study therefore seeks to understand the psychological adjustment experiences specifically from the expatriate spouses’ perspective in order to ‘educate’ and prepare other potential expatriate spouses for what they might experience when they find themselves in a similar situation.

#### **1.4 PROBLEM STATEMENT**

The research question is as follows:

What are the cross-cultural adjustments expatriate spouses’ experience in a host country?

The findings from Shah and Lund (2007:94) indicated that despite important consequences resulting from difficulties in spousal adjustment, efforts to understand the experiences of spouses have been minimal. Although the adjustment of both spouses and expatriates is likely to be influenced by many similar factors, current theories of expatriate adjustment are not adequate to explain spouse adjustment. While existing research identifies the influence of expatriate family adjustment on expatriate effectiveness, studies exploring the phenomenon from the spouses’ perspectives are lacking. In an effort to understand the experiences that facilitate or inhibit spousal cross-cultural adjustment, this study will examine the different cross-cultural experiences of a group of expatriate spouses living in Italy.

#### **1.5 AIMS OF THE STUDY**

The aim of this research is to come to some understanding of the different cross-cultural adjustments that the expatriate spouse experiences when living in the host country. It further investigates how these adjustment experiences influence the

expatriate spouse as a person. The adjustment experiences will contribute in a positive or negative way therefore aiding the adjustment or maladjustment process of the spouse.

In order to answer the research question, the following specific aims will guide this study. The study will attempt:

- To conduct a thorough literature review of the cross-cultural adjustment experiences of the expatriate spouse to gain background knowledge in order to achieve the aims of the study.
- To explore and discover, through an empirical investigation, the cross-cultural adjustment experiences of the expatriate spouse and how these experiences influence the spouse.
- To make a positive contribution to the existing body of knowledge regarding expatriation, more specifically from the spouse's perspectives and how the spouse experiences cross-cultural adjustment.

## **1.6 RESEARCH METHOD**

During this empirical study, I engaged in a qualitative research design. Qualitative research is most suited for the purpose of my study in terms of obtaining specific opinions, emotions, thoughts, feelings and relationships of individuals from a specific population identified, in my case, spouses on an expatriate assignment in Rome. I will make use of in-depth interviewing for optimal collection of data. After the interviews, I will conduct a focus group session. Specific details about the research method follow in Chapter 3.

## **1.7 CLARIFICATION OF CONCEPTS**

- Expatriate: An individual that is living in a country other than their native country. An expatriate may also live in a host country while working for an organization from their home/parent country (Griffin & Pustay, 2002:88).
- Expatriate Assignment: A job transfer that takes the employee to a workplace that is outside the country in which he or she is a citizen. Expatriate assignments are longer in duration than other types of international assignments, for example businesses trips, and require the employee to move his or her entire household to the foreign location (Peters, Green & Youngblood, 1997:121).

- Expatriate failure: the percentage of expatriates returning home before their assignment contract expires (Harzig, 1995:457)
- Adjustment: Black and Gregersen's (1991:462) definition of adjustment is the degree of a person's psychological overall comfort.
- Expatriate Adjustment: the degree of psychological adjustment experienced by the individual, or the degree of comfort, familiarity, and ease that the individual feels towards the new environment (Yavas, 2001:61).
- Cross-cultural adjustment is defined as the degree of psychological comfort and familiarity that the individual has in the new environment (Black, 1990:86).
- Cultural novelty refers to the perceived difference between the host country and a participant's country of origin (Shaffer & Harrison, 2001:239).

## **1.8 CHAPTER OVERVIEW**

### Chapter 1: Orientation of the study

Chapter 1 provides the background for the study and sets the tone for the following chapters. It serves as a concise outline of what can be expected in this study and how it will move forward. In Chapter 1, I gave insight into how my journey started concerning the topic, as well as some background information. I discuss the research question, the aims of the study and the definitions of key terms. The research methods that were used are also explained although very brief. A thorough explanation on the research design and methods will follow in Chapter 3.

### Chapter 2: Literature Study

The focus of the literature study is on the experiences of the cross-cultural adjustment of expatriate spouses. The literature study includes areas of adjustment for a spouse as well as the influence that the adjustment has on the spouse. Attention is given to the models that possibly explain expatriate spouse adjustment.

### Chapter 3: Research Methods and Data Collection

In the research chapter, the research design, methodology and participant selection are explained as planned. The research methods, data collection and analysis are done and lastly the limitations and ethical procedures and considerations are discussed.

#### Chapter 4: Data Analysis and Interpretation of Research Findings

In this chapter, the analysis, interpretations, representations, findings and final conclusions are provided in detail.

#### Chapter 5: Recommendations for possible expatriate spouses.

These recommendations can be used to prepare spouses for what they might experience in the host country. Expatriates and companies sending expatriates will gain a deeper understanding of how they can support expatriate spouses during their adjustment period in the host country.

#### Chapter 6: The Summary, Conclusions and Recommendations

In the final chapter, I present a short summary of the findings achieved with this research study. The conclusions are drawn on the research findings and the limitations of the study are discussed in more detail. Then the contributions of the study are explained as well as the implications and recommendations for further research options.

## CHAPTER 2: LITERATURE REVIEW

### 2.1 INTRODUCTION

The purpose of this study is to obtain a better understanding of the cross-cultural adjustment experiences of expatriate spouses in a host country. For the purpose of this study the following concepts were included in this literature chapter.

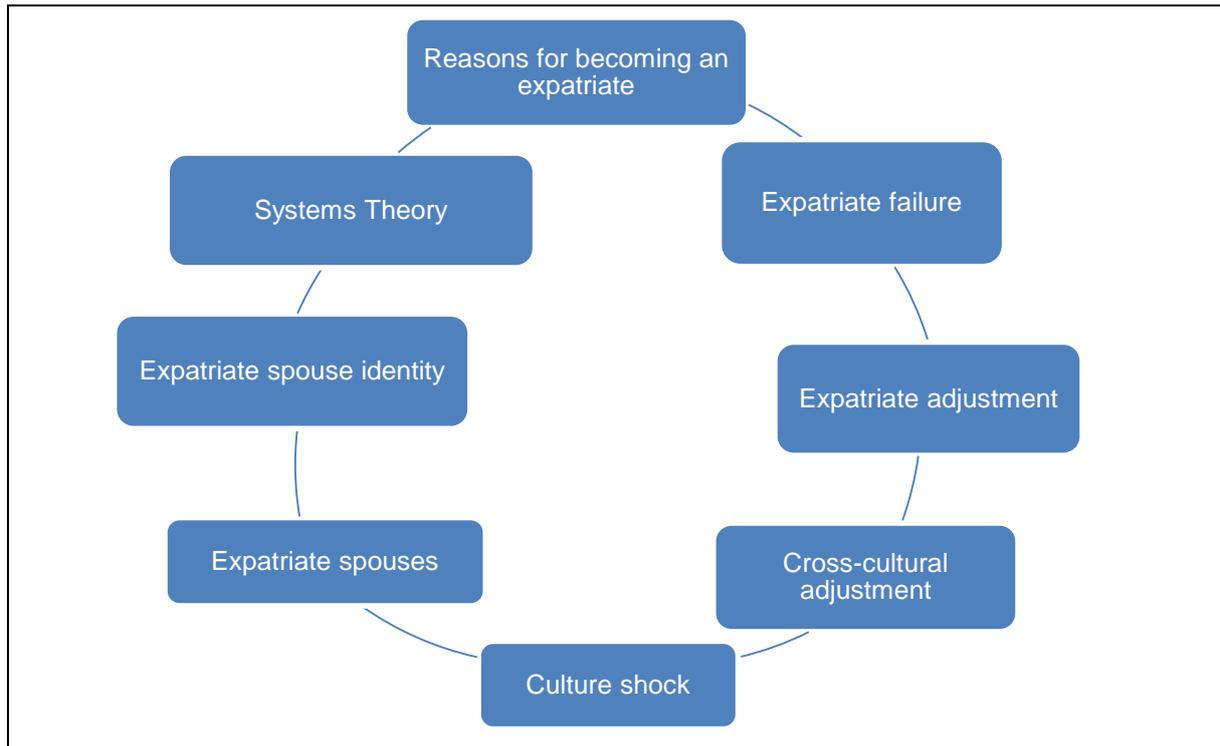


Figure 2.1 Concepts included in the literature review

### 2.2 EXPATRIATE DEFINED

The term expatriate is used continuously in this study. For clarification purposes, it is viewed important to obtain a sound understanding of the concept, as well as its applicability to the sample of individuals included in this research. Chan (1999:55) defined an expatriate as “a business employee, who has chosen to work and live in a place away from the country of which he is a national”. Cascio and Aguinis (2005:440) defined an expatriate as “a generic term that is applied to any person who is working outside his or her home-country with a planned return to that or a third country”. An expatriate may also live in a host country while working for an organisation from their home/parent country (Griffin & Pustay, 2002:88). For the purpose of this study, an

expatriate is defined as “an individual who is living in a country other than his/her native country”.

### **2.3 REASONS FOR BECOMING AN EXPATRIATE**

Suutari and Brewster (2003:186) identified the following reasons for people wanting to become expatriates:

- The individual often shows an interest in working on an international assignment. The person’s decision to become an expatriate is influenced by anticipated experiences and challenges associated with international assignments;
- International assignments are often associated with definite financial benefits. According to Suutari and Brewster (2003:186), differences in cost-of-living and taxation practices across countries can have a considerable impact on the individual’s standard of living. McCallum and Olson (2004:67) agree that financial incentives play a significant role in attracting individuals to international assignments. According to them, one of the primary factors taken into account by the prospective expatriate is the extent to which his overall living situation will be affected by the specific assignment;
- Personal development through the availability of challenging jobs in foreign countries is often viewed as a central consideration in the expatriate’s decision to consider going on an international assignment (Suutari & Brewster, 2003:187). A study conducted by Black and Gregersen (1999:56) confirms this observation, indicating that candidate expatriates with a Master’s degree in Business Administration (MBA) ranked personal growth and gaining a cross-cultural experience as the main reason why they would accept international assignments;
- Prospective career development opportunities are often considered as critical factors in the expatriate’s decision to accept an international assignment (Suutari & Brewster, 2003:188). Commenting on the above-mentioned reasons for individuals considering expatriation, McCallum and Olson (2004:68) asserted that organisations are required to effectively meet the needs of expatriates who have different expectations about international assignments compared to their

predecessors. They view international assignments as advancement opportunities for longer term career growth and development. As a result, companies are in the process of moving away from haphazard and unplanned assignments. Instead, international assignments are viewed as strategic tools that can be employed in achieving career and business development opportunities in line with the strategic direction and objectives of the company.

## **2.4 EXPATRIATE FAILURE**

One of the most challenging issues facing the multinational firm is the management of the human resources required to ensure the successful management of their diverse international interests. The cost of sending people overseas on an expatriate assignment is a very heavy financial burden to carry for a company. A definite concern in this regard would be the results obtained from research literature, which indicate that expatriate failure is a continual and persistent problem experienced by multinational companies (Schumacher, 2000:104; Van Heerden & Wentzel, 2002:82; Trompenaars & Hampden-Turner, 2004:64;). In order to ensure a sufficiently accurate discussion of expatriate failure and the costs involved, it is important to clarify exactly what is meant by the concept.

## **2.5 EXPATRIATE FAILURE DEFINED**

A commonly accepted definition for expatriate failure is the “premature return or recall of an expatriate to the home-country before the period of assignment is completed” (Morley, Burke, O'Regan & Inwood, 1997:54; Dowling, Randall & Welch, 1999:165; Treven, 2001:177; Vermeulen, 2002:66; Bampton, 2003:35). In line with the definition provided above, Harzig (1995:457) indicated that most research publications define and measure expatriate failure as “the percentage of expatriates returning home before their assignment contract expires”.

Some disagreement seems to exist among researchers in the usefulness of describing expatriate failure in such a narrow way as defined. Dowling, *et al.* (1999:166) argued that an expatriate may be ineffective and experience difficulty adjusting to the environment in the foreign country. However, his contract may not be terminated by the company. If the manager is experiencing difficulty coping on a cultural level, the performance of the business unit will be affected, which may result in low morale

among host-country nationals or dissatisfied clients. Within the framework of the definition of expatriate failure, such an individual will not be viewed as a failure, despite the damage he or she will be doing by remaining on the contract. Taking into account the above mentioned discussion, Dowling, *et al.* (1999:166) were of the opinion that the return cannot be considered as being the ideal measure of expatriate success or failure, and that it may underestimate the real extent of the problem.

A more comprehensive definition of expatriate failure was presented by Black and Gregersen (1999:55), who proposed that “expatriate failure can be defined in terms of early return home or termination”. However, they added that the following areas need to be incorporated into the definition of expatriate failure:

- Personal unhappiness and frustration experienced by the expatriate and/or his/her family with the international assignment;
- Poor performance while on international assignment;
- An inability to adapt to the living and work conditions in the foreign country; and
- Poor relations with local employees, government officials, customers, and suppliers.

Despite its limitations, the common definition for expatriate failure is the inability of the expatriate to perform effectively in the international assignment, and thus the expatriate returns to the home country before the expiry of the international assignment contract (Chan, 1999:55; Yavas, 2001:63; Vermeulen, 2002:66). The above definition is also generally utilised by researchers and multinational companies to calculate actual expatriate failure rates, and to highlight the problems encountered in staffing overseas subsidiaries with parent country nationals and third-country nationals.

## **2.6 EXPATRIATE FAILURE RATES**

According to Treven (2001:178), the proportion of American expatriates who fail in their global assignments and return prematurely ranges from 20 percent to 40 percent, with the higher rates associated with assignments in underdeveloped or developing countries. Yavas (2001:61) agreed with Treven, asserting that the failure rate among expatriates who were sent on international assignments to underdeveloped countries could be as high as 70 percent. Beaverstock (2000) suggested that “between 20 to 50

percent of personnel sent abroad return prematurely from their overseas assignments”.

From an individual point of view, expatriate failure also has a direct negative impact on the well-being of the expatriate and his family. Considering that the cost involved in expatriating individuals and their families for international assignments is typically three times more than appointing a person in an equivalent position in the parent company, a failed assignment has the potential to have a seriously detrimental impact on the expatriate’s career (Black & Gregersen, 1999:53). A failed assignment can also lead to the expatriate experiencing a serious loss of self-esteem, loss of reputation among colleagues, and a serious setback from a promotional opportunities perspective.

As can be seen from the aforementioned discussions, expatriate failure is costly and can have a substantially detrimental impact on the competitiveness and the success of an organisation. Given the high failure rates among expatriates and the costs associated with expatriate failure as discussed so far, it is critically important to identify accurately the reasons why expatriates, who are sent on international assignments to foreign countries, fail (Kubes & Loh, 2006:3).

## **2.7 REASONS FOR EXPATRIATE FAILURE**

A number of studies have been conducted in South Africa and internationally to investigate why expatriates who are sent on international assignments fail. A survey conducted with South African companies involved with expatriation indicated the following main reasons for failed assignments (Van Heerden & Wentzel, 2002:11):

- Personal reasons 62%
- Health considerations 10%
- Performance related matters 28%

In the above-mentioned statistics, only 28 percent of the reasons for expatriate failure can be attributed to the individual’s technical competence and actual performance in the work environment. The vast majority of the reasons for the failure (62%) were associated with personal factors relating *inter alia* to the expatriate’s spouse or family, or his personal and living environment external to the job. This links up with the

argument of why more research should be done on the spouses' cross-cultural adjustment process.

The results obtained from studies conducted in South Africa on expatriate failure seem to correlate well with the international findings. Brotchi and Engvig (2006:3) identified the following factors as the key reasons for expatriate failure (in descending order of importance):

- Inability of spouse to adjust to the living conditions in the foreign country;
- Expatriate's own inability to adjust to the foreign environment;
- Impact of expatriation process on the family;
- Expatriates' level of emotional maturity; and
- Expatriates' inability to cope with pressures associated with managing larger overseas responsibility.

Similarly, Van Weerdenburg (2006:5) identified three primary reasons why employees who are sent on international assignments fail:

- Their families are misjudged, or not even considered at the time of selection;
- Expatriates are selected based on their domestic track record; and
- Expatriates lack adequate cross-cultural training.

A major reason for the high expatriate failure rates experienced by multinational companies is the inadequate selection criteria and procedures utilised during their selection of candidates for international assignments (Van Weerdenburg, 2006:5).

Van Weerdenburg (2006:5) argued that most international companies focussed their efforts during selection of candidates for expatriation solely on two criteria, namely technical ability and willingness to go on an international assignment. Similarly, a PriceWaterhouseCoopers survey (McNulty, 2004:10) indicated that the most popular expatriate selection criteria utilised by 270 international companies were:

- Job-specific and technical skills;
- Leadership skills;
- Career development opportunity for the employee;
- Language ability;
- Ability of family to adjust to living conditions in the foreign country; and

- The employee's ability to effectively interact with people from other cultures.

Interestingly, the following criteria were listed as being the least important during selection of candidates for international assignments (McNulty, 2004:10):

- Ability of the spouse to effectively interact with individuals from other cultures;
- The educational needs of the children;
- Emotional maturity and resilience;
- The impact of the international assignment on the spouse's career, and
- The suitability of the individual and the family from a lifestyle perspective.

These criteria were also found to be the most common reasons for expatriate failure. The consequences of multinational companies applying such a haphazard and non-scientific approach to selecting employees for international assignments can be severe, wide-ranging and very often lead to expatriate failure.

## **2.8 THE RELATIONSHIP BETWEEN FAMILY ADJUSTMENT AND EXPATRIATE SUCCESS OR FAILURE**

In a study among American expatriates, Caligiuri, Hyland, Joshi, and Bross (1998:599) found that family adjustment was a significant predictor of the desire to terminate the international business assignment. Among a sample of 115 American expatriates, Caligiuri, *et al.* (1998:599) studied factors that contributed to expatriates' dissatisfaction and intent to quit the job, organisation and foreign location. Their empirical study showed that, among other factors (e.g. demographics, quality of life, job satisfaction, job autonomy), family factors significantly influenced expatriates' turnover intentions. The variables studied under the family factor were change in spouse's attitude, spouse's adjustment, spouse's satisfaction and number of children. The first three variables were found to be highly associated with the expatriates' turnover intentions. Caligiuri, *et al.* (1998:599) surveyed a sample of 338 expatriates, representing 56 nationalities, and asked them to rate the importance of a large number of factors to the success of an international assignment. Family factors ranked among the most important factors. Examples of family factors were the adaptability of the spouse and family, the spouse's positive opinion, the willingness of the spouse to live abroad, and a stable marriage.

## **2.9 EXPATRIATE ADJUSTMENT**

Marx (1999:4) asserted that all individuals who arrived on an international assignment in a foreign country for the first time were confronted with the same basic challenges: adjusting to the new culture in the foreign country, and becoming effective in managing the unique demands placed on them as expatriates. The term 'adjustment' is defined as "a subjective or psychological state, and refers to the changes which the individual actively brings about or passively accepts in order to achieve or maintain satisfactory states of emotional balance with him or herself" (Yavas, 2001:60). Numerous definitions have been proposed for expatriate adjustment. Yavas (2001:61) defined expatriate adjustment as "the degree of psychological adjustment experienced by the individual, or the degree of comfort, familiarity, and ease that the individual feels towards the new environment". According to Yavas, expatriate adjustment is a type of cross-cultural adjustment. Morley, *et al.* (1997:55) described adjustment as a process whereby expatriates re-establish those routines that provide valued outcomes and predictable feelings of control. Punnett (1997:244) pointed out that the adjustment process was not only applicable to the expatriate, but would also have a direct influence on family members who have also been transferred into the foreign environment.

## **2.10 CROSS CULTURAL ADJUSTMENT**

The process of adjusting to another culture has been conceptualised as multidimensional, consisting of at least three factors that involve adjustment to the general living environment in the foreign culture, to work expectations and roles, and to interactional situations and norms (Black, Gregersen, Mendenhall, and Stroh, 1999:35). The general dimension of cross-cultural adjustment refers to the individual's psychological comfort, familiarity, and ease of adjustment regarding features of the general environment (e.g. weather, food, and living conditions). The work dimension of cross-cultural adjustment denotes the degree of psychological comfort an individual feels with various aspects of work (e.g. managing authority relationships). The interactional dimension of cross-cultural adjustment concerns the individual's psychological comfort regarding interpersonal communication differences (e.g. socializing with the host country nationals). To be parsimonious, the dimensions of

cross-cultural adjustment can be referred to as simply general, work, and interactional forms of cross-cultural adjustment.

## **2.11 CULTURE SHOCK**

Trompenaars and Hampton-Turner (2004:331) also refer to this process of expatriate adjustment as “culture shock”. The term “culture shock” was originally coined by the anthropologist Oberg (cited in Marx, 1999:5), who explained both the symptoms and the process an individual goes through in adjusting to a new culture. According to Oberg, having to adjust to the new culture, is viewed as a shock or as an unpleasant disruption. This shock takes place when the person’s expectations are not in line with the practical reality.

Mitrovica (2001:11) states categorically that experiencing culture shock is not a weakness or a negative indication of future international success. According to Mitrovica, culture shock forms part of the normal adjustment process that successful expatriates go through in adjusting to the culture in a foreign country. Gelfand, Erez and Aycan (2006:78) agreed with Mitrovica in this regard, indicating that severe culture shock is often indicative of an expatriate becoming deeply involved and learning the new culture, as opposed to isolating him or herself in an “expatriate ghetto”. The expatriate experiencing the culture shock should therefore view the adjustment process as a sign that they are doing something right, and not wrong. For them, the important question therefore becomes how best to manage the stress caused by culture shock, not how to avoid the culture shock itself.

A study conducted by Hawes and Kealy (cited in Marx 1999:7) on Canadian expatriates in Africa confirmed these findings. In their study, Hawes and Kealy found that those expatriates who experienced culture shock were ultimately the most effective. Expatriates that were most aware of themselves and their emotions experienced the most intense culture shock, but it was exactly because of this intense awareness of differences that they were able to adapt more effectively later on. In contrast, expatriates who were not affected by culture shock and generalised their own views to the other culture, did not adapt very well. According to Marx (1999:7), culture shock is therefore a positive indication in the process of international adjustment.

Black and Gregersen (2003:65) went so far as to assert that it was impossible for the expatriate to inoculate him or herself to avoid culture shock. Even if it were possible to avoid the culture shock experience, it would not be advisable. According to them, the expatriate learns the most valuable lessons by directly experiencing the anxiety and frustration of trying to understand the country and its culture, and by adjusting the existing ways of doing things to the local customs in the host country. However, Black and Gregersen (2003:65) also cautioned that severe culture shock can also lead to significant problems from a business and personal point of view.

## **2.12 CULTURE SHOCK CYCLE**

According to the culture shock adjustment model developed by Oberg (cited in Marx, 1999:7), an expatriate's adjustment to a new environment progresses through a cycle of clearly defined phases on the way to final adjustment. Oberg highlighted six symptoms typically experienced by expatriates when they are subjected to culture shock:

- stress caused by the effort to adjust to the new environment;
- emotions of deprivation due to loss of family, friends, status, career, and personal belongings;
- experiencing rejection from local nationals in the host country, or isolating self from them;
- disorientation in values, function and self-identity;
- apprehension and antagonism towards local practices in foreign culture; and
- emotions of helplessness due to an inability to adjust to the foreign conditions.

Torbiorn (cited in Beaverstock, 2000:21) made certain adjustments to Oberg's culture shock model in order to incorporate the various phases of the expatriate adjustment process. According to Torbiorn, newly arriving expatriates typically experience an initial "honeymoon" phase, followed by "culture shock", and then progress through a difficult but necessary adjustment phase towards recovery and integration into the foreign culture. The expatriate's cross cultural adjustment to the environment in a foreign country can be described as a U-shape curve and is referred to as the culture shock cycle (Chan, 1999:34; Hodgetts & Luthans, 2003:305).

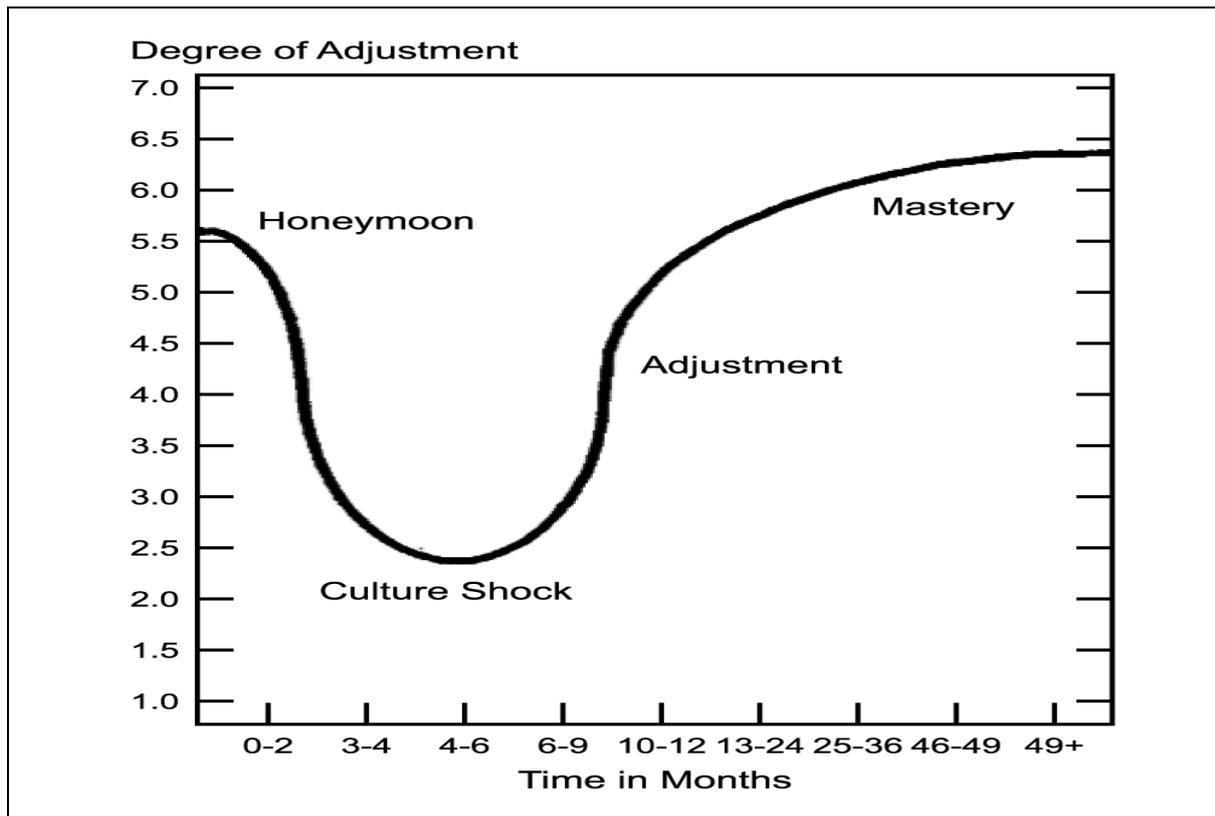


Figure 2.2 Culture shock cycle

Source: Hodgetts and Luthans (2003)

A number of attempts have been made to specify the timing of the various phases involved in the culture shock cycle, and to define what is 'normal' in adapting to a foreign culture. Trompenaars and Hampton-Turner (2004:25) argued that no hard-and-fast rule exists in this regard, and that it is not possible to give an exact indication of the "typical time" it takes the expatriate to adjust to the foreign culture. The timing of the culture shock will depend on the "foreignness" of the culture (how different it is from the person's own culture), the social context (whether the person has support through an expatriate network or through host-country nationals), and the personality of the international manager involved. The process of culture shock should not be regarded as a strictly linear process. It should rather be viewed as a repetitive and dynamic series of positive and negative phases until the expatriate breaks through the culture shock.

## **2.13 PHASES OF CULTURE SHOCK**

### **2.13.1 Phase 1: Honeymoon**

During the initial honeymoon phase, the expatriates enjoy a great deal of excitement as they discover the new culture (Marx, 1999:9). Everything they come into contact with is viewed as new and stimulating. The new environment is seen as presenting unlimited opportunities. The expatriate often experiences intense emotions of happiness and curiosity, and shows great eagerness to face whatever challenges coming their way. The newly arrived expatriate tends to reserve his judgement of the new culture at this stage, and may even suppress minor irritations in favour of focusing on the pleasant things surrounding them.

### **2.13.2 Phase 2: Culture shock**

The second phase, culture shock, is generally characterised by the expatriate experiencing a general discomfort and foreignness towards the new situation. The discomfort often starts with the person feeling confused about developments in the foreign environment. The person may also suffer abnormal symptoms such as becoming highly stressed and irritable, experiencing difficulty doing 'normal' things such as eating or sleeping, and developing an overly negative perspective towards his surroundings in the new country. The main reason for the mentioned symptoms of culture shock is the uncertainty experienced by the expatriate about him or herself. The usual signs of orientation and belonging that used to be in place in the home country do not apply anymore, and the person does not quite know who he is without the familiar social context (Punnett, 1997:245; Trompenaars & Hampton-Turner, 2004:27).

The initial phase of confusion is often followed by a period of intense emotional turmoil and disillusionment. This period of disillusionment forms the bottom of the U-shaped curve and is characterised by culture shock – the frustration and confusion associated with being faced with too many unknown and confusing stimuli (Punnett, 1997:245; Brotchi & Engvig, 2006:55).

### **2.13.3 Phase 3: Adjustment**

The adjustment stage is the period where expatriates gradually become more familiar and receptive towards the foreign culture. They become increasingly competent at functioning effectively in the new environment. After approximately three to six months, the expatriates outgrow their culture shock low and begin living a more normal life in the foreign country. They start feeling more positive, working more effectively, and living a more satisfied lifestyle. In small steps they learn what is important and what is meaningful in the foreign culture. A key aspect identified by Punnett (1997:245) to escaping the culture shock “low”, is effective problem solving. Successful expatriates recognise that the foreign environment makes many demands for which they must find and create solutions. Critical skills required by expatriates during their initial adjustment to the foreign country would be the ability (a) to be patient, and (b) to be creative in finding unique solutions to unfamiliar problems.

### **2.13.4 Phase 3: Mastery**

Mastery occurs when the expatriate is able to easily function in the host country. The expatriate has mastered the ability to live as effectively as they lived in their home country.

## **2.14 EXPATRIATE SPOUSE**

In this study, an expatriate spouse is defined as any individual in a marital- equivalent relationship who has accompanied an expatriate employee on their foreign assignment. According to Black and Gregerson (1991:461), approximately 80% of expatriates are married, with consultancies estimating that spouses/partners accompany around 60% of expatriates. It is therefore understandable that research on expatriate adjustment has pointed out the importance of the role that the expatriate spouse plays in the adjustment process (Dowling & Welch, 2004:110).

Specifically, the adjustment of the expatriate spouse has been found to positively and significantly influence the expatriate’s adjustment, and thus outcomes such as expatriate success or failure (Black & Gregerson, 1991:463, Shaffer & Harrison, 1998:100; Takeuchi, Yun & Tesluk, 2002:658). For example, Tung (1982:57) found the inability of the spouse to adjust to be the most common reason reported by both United States and West European firms in relation to expatriate failure or poor

performance. Brookfield GRS (2011:21) echoed the findings of researchers like Black and Gregerson (1991:463), Shaffer and Harrison (1998:100), Takeuchi, et al., (2002:658) with their results. They found more recently that companies indicated family adjustment to be one of the top three critical family-related expatriate issues for their company.

## **2.15 IDENTITY**

According to Burke's (1991:836) identity disruption theory, which is based on an integration of the stress and identity literatures, disruptions in the identity process occur when individuals enter new cultures or adopt noteworthy new roles. In such situations, a person's perceived meanings are often incongruent with his or her identity standard: the set of meanings or roles that define who one is. Incongruence's between an individual's identity standard and the inputs received from the environment result in distress.

Reducing the distress requires changing one's behaviours. These behavioural changes then serve as causal inputs to the formation of a revised self-concept that facilitates adjustment (Burke, 1991:836). From a constructivist perspective, identity formation is a life-long process whereby one's identity is restructured or revised in response to self-relevant life experiences. Shaffer and Harrison (2001:241) are of the opinion that all expatriate spouses are likely to go through some disruption or change in their identity which they term a "reformation". Some disruptions are more extreme than others, ranging from a reduction in the clarity of their identity to a need to form a new one.

Figure 2.3 below is used to explain identity and the influence expatriation has on the spouse's identity.

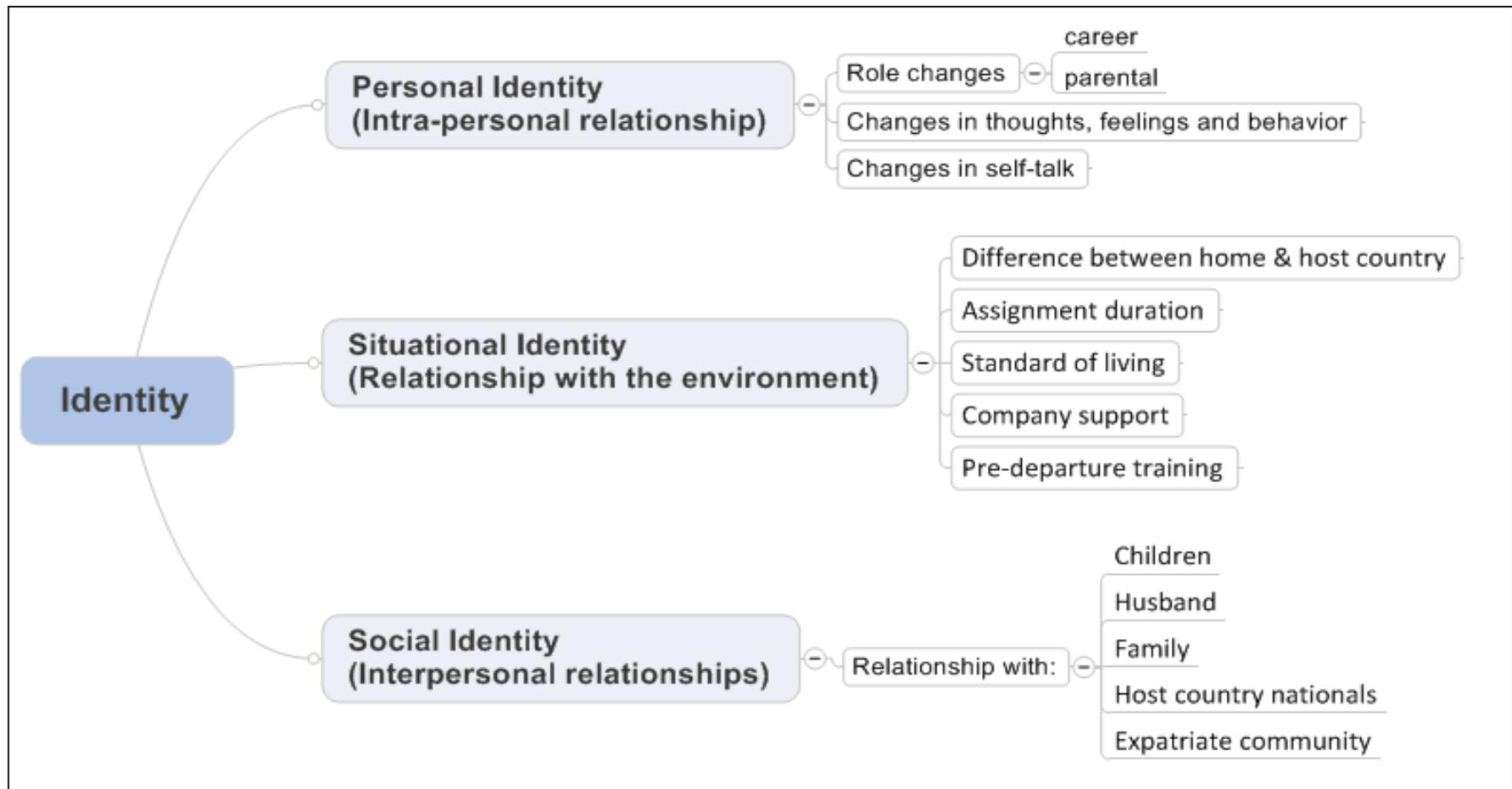


Figure 2.3 Sources of Identity

One useful, overarching framework is Social Identity Theory (SIT), which posits that lost personal identity stems from a lack of social identification (Tajfel, 1982: 483; Tajfel & Turner, 1985:10). Social identification (the perception of being part of a larger collective) and personal identification (one's general physical features, abilities, interests, and psychological traits) are part of one's self-concept. In a complementary theory, another vital part of identification is the development of one's situational definition of self (Ashforth & Mael, 1989:21). Individuals sharing similar situations and experiences are more likely to identify with each other. Identification with other expatriate spouses may result in the development of an expatriate spouse persona and acquisition of behaviours that will facilitate adjustment (Mael, 1991:763).

Situational cues also highlight some of the distinct or common characteristics of persons compared with others in the immediate environment. For example, being the only American spouse in a North African location may strengthen one's identity as a U.S. citizen and prompt resistance or reluctance to accept the foreign culture. Thus, the formation of one's overall identity or self-concept stems from three major sources: from within oneself or individual antecedents, from interactions with others or interpersonal relationship antecedents, and from interactions with one's situational context or environmental antecedents (Ogden, 1995:410).

## **2.16 IDENTITY BASED ANTECEDENTS OF SPOUSAL ADJUSTMENT**

### **2.16.1 Individual Antecedents: Personal Identity**

This set of identity variables refers to basic psychological, experiential, and behavioural attributes that spouses bring with themselves to international assignments. According to the SIT, (Tajfel, 1982:485; Tajfel & Turner, 1985:10), these variables form the personal identity component of one's self-concept. Shaffer and Harrison (2001:240) were able to identify personal factors that potentially influenced the adjustment of expatriate spouses. They were host-country language fluency, change in employment status and self-efficacy. In fact, all spouses who had a positive international experience had earlier acquired a basic repertoire in the host country's language and none of those who had a negative experience attempted to learn it. This finding is consistent with bio-data literature (Mael, 1991:765), which suggests inadequate personal resources, such as host country language skills may undermine one's self-concept.

Similarly, spouses in Shaffer and Harrison's (2001:240) study, who experienced a change in self-concept, appeared to have either a greater initial decrease in the clarity of their self-concept or a greater need to form a new identity incorporating their changed status. In contrast, spouses who did not experience a change in employment status were better able to transport their definitions of self to the new environment their adjustment process was smoother. Earlier studies of role loss suggested such changes instigate wide-ranging negative effects, losses to self-esteem, and increased psychological withdrawal (Schlenker & Gutek, 1987:289).

### **2.16.2 Career Issues**

With increasing numbers of dual-career couples, career issues are becoming a critical factor in decisions to accept an international assignment (Pellico & Stroh, 1997:229). In most cases, the spouse has to give up a job or forgo continuing educational or other career-related pursuits to "trail" after the expatriate. Work permit restrictions in many countries make it difficult, if not impossible, for spouses to continue careers while overseas (Pellico & Stroh, 1997:230). Spouses face many obstacles to obtain employment, including visa restrictions, cultural and language barriers, lack of recognition of foreign qualifications, lack of available jobs, reluctance of local managers to employ transient expatriates, and preference for local hire. Accompanying spouses who want to work must overcome all these obstacles, create a new professional network, and develop a new system, all on their own while their partner is absorbed with working long hours and frequent travel on his new assignment (Shaffer & Harrison, 2001:239).

It has been suggested that a more fine-grained analysis of the employment status of expatriate couples should be employed, based on the fact that the spouse may have an 'income' versus a 'career' orientation to his or her employment (Harvey, 1997:630; Shaffer & Harrison, 2001:245; Konopaske, Robie & Ivancevich, 2005:410). A spouse with a career orientation may suffer more loss of identity as a result of an interruption of employment than a spouse whose primary purpose in working is to increase family income. A spouse, whose work outside the home is intended to supplement family income, is using work solely as a means to an end in order to increase financial support for his or her family. Their work does not represent a separate aspect of their identity, which remains strongly related to their position in the family. The additional challenges

and difficulties facing expatriate spouses with a career would be expected to create a more difficult adjustment to the expatriate assignment than for spouses whose employment is solely focused on increasing family income.

In their model for development of a social support system for dual-career expatriate couples, Harvey and Buckley (1998:100) suggested that the stage of the spouse's career life cycle had the potential to moderate the effectiveness of spousal assistance programs. If the spouse is in the initial career stage involving trial and exploration, expatriation may provide an opportunity to continue his or her education and then use the international academic credentials to his or her advantage when looking for a position after returning home. Spouses in the growth/establishment stage are under pressure to prove themselves by exhibiting their competence and demonstrating their future potential, and interruptions of employment can be perceived as lack of commitment to their work. In the maintenance stage, where the accompanying spouse is vested in his or her career by way of a senior management position, partnership in a professional firm, or ownership of a business, it may be very difficult for the spouse to relocate at all. Finally, for spouses in the declining years of their career, the opportunity for an expatriate experience may provide the opportunity for a form of sabbatical leave or even early retirement. Therefore, employer-provided spousal assistance regarding employment is likely to be most beneficial to spouses in the growth/establishment and maintenance stages of their careers.

Researchers have noted that with the dramatic increase in the number of dual career couples being asked to take expatriate positions, changes in employment status and possible sacrifices of professional careers on the part of spouses are likely to become important identity issues (Harvey, 1997:629; Caligiuri, Hyland, Joshi & Bross, 1998: 560). Social identity theory (Tajfel, 1982:486) posits that social identity is the aspect of self-concept stemming from membership in particular groups. People who are employed derive part of their identity through their employment-related interactions with others. For people who have made a large investment in professional education and training, or who have been with an organisation for a long period of time, the amount of their identity relating to membership in their profession or work organisation can be significant.

Expatriate spouses, whose employment relationships are interrupted for some time or completely put on hold, thus lose an important aspect of their social identity. Spouses who have worked hard at building a career and are used to making a significant contribution to the family income may feel uncertain about who they have become in their new role as the spouse of an expatriate. Spouses who do not experience a change in employment status because they are able to work at the same or a similar job may be better able to maintain their social identity in a new environment.

### **2.16.3 Thoughts, Feelings and Behaviour of Spouses**

Many of the spouses in Shaffer and Harrison's (2001:241) study indicated their self-confidence or self-efficacy was an important adjustment antecedent. This is in line with Black and Gregerson's (1991:294) inclusion of self-efficacy as an important determinant of expatriate adjustment. Self-efficacy has been conceptualised as having general and social dimensions. It is also the major construct associated with an intra-active identity in which individuals interact with their inner selves (Ogden, 1995:412). General self-efficacy focuses on performance attainment. It was evident in expatriate spouses' comments reflecting a (lack of) ability or confidence in dealing with their new situation. Social self-efficacy focuses on relationship development, and several spouses expressed lack of interpersonal confidence. Therefore, researchers found both dimensions of self-efficacy (general and social) to have an influence on spouse adjustment.

## **2.17 ENVIRONMENTAL ANTECEDENTS: SITUATIONAL IDENTITY**

An individual's self-concept stems not only from within, as well as from interactions with others, but also from interactions with other elements of the external environment (Ogden, 1995:410). Various situational or contextual factors, such as qualities of the local community in general and the home in particular, affect one's identification with a particular place.

### **2.17.1 Cultural Novelty**

Mohr and Klein (2004:1193) found cultural novelty to be related to general adjustment. Cultural novelty refers to the perception of cultural difference between the host and home countries. Cultural novelty is manifested in a variety of customs, religion, language, and social values of countries (cf. 2.3). The greater the difference between

the level of development of the home country and the host country, the more the spouse will experience discomfort and the more difficult the expatriate adjustment will be. A spouse in a host country that is much less developed than his or her home country may face more uncertainty and more difficulties in all aspects of life than a spouse in host country that is similar in level of development to his or her own country. Thus spouses on assignments with large variances between the level of development of the home and host countries can be expected to perceive more difficult periods of adjustment than spouses on assignments with smaller variances between the level of development in the home and host country. Mohr and Klein (2004:1193) also suggest that perceived cultural novelty of the country affects attitudes regarding the move. The degree of cultural difference between host and home countries may also impact psychological health. Larger differences may result in individuals having a more difficult time obtaining social support, whereas the lack of cultural familiarity could impact methods of coping that individuals relied on in their home countries.

### **2.17.2 Living Conditions and Assignment Duration**

Shaffer and Harrison (2001:239) identified three situational sources that have potential influences on the spouses' identity formation process. Two of these, namely cultural novelty and favourability of living conditions, are quite salient in a foreign environment and have been related to spouse adjustment, as well as expatriate adjustment, in past research (Black & Gregersen, 1991:461; Shaffer & Harrison, 1998:91). Living conditions refer to how well one's current accommodations match the living standards to which one is accustomed. The greater the disparity between cultures and the less favourable the living conditions, the more difficult the required adjustment. A third situational factor was certainty of assignment duration. This was identified as critical by most of the spouses interviewed by Shaffer and Harrison (2001:240). Spouses preferred (and some explicitly requested) a fixed assignment duration to establish some role clarity or to feel some control over their situation.

### **2.18 INTERPERSONAL RELATIONSHIP ANTECEDENTS: SOCIAL IDENTITY**

When embarking upon life in a new culture, one's ability to form cognitive schemas and accurate, functional, attributions can prove to be fairly complicated. Social support can provide individuals with assistance, information, and feedback for reducing uncertainty about difficult experiences, and the uncertainty they feel about themselves

in relation to others (Adelman, 1988:186); Furthermore, according to Adelman (1988:187), with regard to the communication aspects of social support, supportive communication from both strong and weak social ties can function to:

- reduce uncertainty;
- provide companionship, resource assistance and information;
- assist mental and physical recovery;
- meet a recipient's needs for venting feelings;
- express messages that provide acceptance or reassurance; and
- improve recipients' interpersonal communication skills for seeking aid.

Relocating to another country and entering a new culture can cause disruption to an individual's home country support systems, evoking the need for the formation of new supportive relationships (Adelman, 1988:185). While support may be disseminated from a wide range of providers, support from similar others is suggested as being of great importance. In essence, sources of support from similar others can provide individuals with situation specific suggestions and a reassurance that one is not alone, in effect, offering a source of social comparison and a pathway through which one can move beyond feelings of redundancy and boredom (Adelman, 1988:187; Copeland & Norell, 2002:258). Exploring the role of social support in relation to expatriation is important; firstly, because of the disruption relocation causes to the existing social support networks and secondly due to the ensuing challenges this poses for expatriates and their spouses.

According to Copeland and Norell (2002:259) the disruption to, and the development of new, social support networks can be particularly stressful for expatriate spouses due to the additional challenges expatriate life presents; for example, competing family responsibilities, social isolation, changes in the spouse's social and/or work status, and socio-political constraints.

Shaffer and Harrison (2001:243) identified two major subcategories of social networks or interpersonal relationships from their interviews with expatriate spouses namely family and a host country network of friends and acquaintances. In the first subcategory, the feeling that one could count on support from extended family members was mentioned as an important source of spouse adjustment.

### **2.18.1 Husband and Children**

Likely the most important influences in a spouse's social environment emanate from the immediate family, including the spouse's partner, the expatriate and any accompanying children (Caligiuri, *et al.*, 1998:601). As a couple, the expatriate and spouse may share experiences and go through similar psychological reactions. For instance, they will likely find each other to be the main source of conversation and communication. Fukuda and Chu (1994) revealed that family-related problems are regarded by Japanese and American firms as a very important contributing factor of an expatriate's failure. Punnet (1997) also reported cases of husbands of transferred women executives who found living in the host country so stressful that it led to the break-up of their marriages.

De Leon and McPartlin (1995) were of the opinion that an overseas assignment is a change that requires the expatriate and the family members to restructure, develop, and adapt to the new and different environment in a host country. The assumption of research is that the success of the international business assignment is not only a function of the expatriate himself or herself but also a function of the trailing expatriate spouse and children. The success of the assignment is determined by the adaptation of the expatriate to the new living conditions, which, in turn, largely depends on the adaptation of expatriate spouses and children to an unfamiliar lifestyle in a foreign country.

Also, those spouses with school-age children indicated that their children provided some stability in social expectations and served as a vehicle for forming relationships with others. Spouses who had a positive international experience, all but one (who had no children) had parental responsibilities. Of the spouses who had a negative international experience, only one had school-age children; none had younger children.

### **2.18.2 Spill-Over between Spouses and Expatriates**

Spill-over theory asserts that an employee's experiences at work can carry over into the home, and experiences at home can affect one's work (Caligiuri, *et al.*, 1998:599). Relocating for work causes significant disruptions in and outside of work that can create uncertainty and stress. Disruptions and resulting levels of stress associated

with a move are significantly greater when it involves an overseas relocation (Adler, 1997:22; Black, *et al.*, 1999: 53). Indeed, the term culture shock is used to capture the stress-related traumatic reactions that many experience when moving overseas (Adler, 1997:22).

One of the spill-over effects that can be expected between cross-cultural adjustment and satisfaction is between general adjustment (non-work domain) and job satisfaction (work domain). When expatriates experience difficulties adjusting to the general environment, they experience more stress in their non-work life. In a similar vein, another spill-over effect, which was expected, is that between work adjustment (work domain) and general satisfaction (non-work domain). Social support may be one of the primary underlying mechanisms that are likely to be operating in stressful circumstance.

Carlson and Perrewe (1999:513) found that social support at work played an indirect role in influencing family satisfaction through lessening work-family conflict. Consequently, if expatriates successfully adjust to their work situations and are able to cultivate relationships with host country nationals who provide social support at work, enhanced adjustment experienced at work can be expected to spill over into the non-work domain to produce greater general satisfaction with living in the foreign culture. In addition, being well adjusted at work may provide expatriates with more cognitive and physical resources (e.g. spending less time at work on weekdays and weekends) to attend to matters that facilitate adjustment to the general environment, for instance, spending more time with the family which promotes the unity of the family.

### **2.18.3 Crossover between Spouses and Expatriates**

Within the work-non-work conflict literature, crossover effects refer to the influence that stress or strain experienced at work by one individual has on the stress or strain experienced by one's significant other at home (Bolger, DeLongis, Kessler & Wethington, 1989: 176), or to the influence that stress or strain experienced by the individual at home has on the stress or strain experienced by the significant other at work (Westman, 2001:557). Because of the relocation involved in expatriate assignments, the family often becomes more isolated from its physical and psychosocial support systems (friends, relatives, colleagues, etc.), and this isolation

constitutes an important loss of support (Harvey & Buckley, 1998:100). As a result of being isolated and losing many of their existing support systems, expatriates and their spouses may become more dependent on one another for support (Harvey & Buckley, 1998:100). Being more dependent on one another can create a situation in which the influences that spouses and expatriates have on each other as part of the cross-cultural adjustment process (i.e. crossover effects) are likely to be particularly salient.

One of the processes whereby an individual's influence crosses over to another is the spouse's experience at home to the expatriate employee's experience at work. When spouses become better adjusted to the general environment of the host culture, more emotional and psychological resources may be available to support the expatriate. For example, spouses may be able to inform the expatriates about host country environments, such as the best use of the transportation systems or how to better make (business) connections. The information provided by the spouses may help socialise the expatriate to the host country (Black & Stephens, 1989:530; Caligiuri, *et al.*, 1998:599; Shaffer & Harrison, 1998:90).

Another potential crossover process is from the expatriate's experience at work to the spouse's experience at home. This crossover effect from the expatriate to spouse has not been directly examined previously in expatriate research but can be hypothesised when considering studies on work-family conflict (Hammer, Allen & Grigsby, 1997:187). Jones and Fletcher (1993:884) found employees' job stress carried over and affected the stress experienced by their spouses. In a typical international assignment, expatriates are likely to be in a familiar environment while they are at work, as compared with spouses who are typically more socially isolated.

#### **2.18.4 Other Expatriate Spouses**

The other source of social identity consists of one's current social network resources or relationships outside one's family. As suggested by identity disruption theory (Burke, 1991:840), host-country nationals are the sources of identity loss, then it is reasonable to expect spouses would seek relationships with similar others. In fact, many spouses interviewed tended to develop relationships with other citizens of their home country or other expatriate spouses. These relationships seemed to help spouses re-establish an identity by providing them with congruent or self-confirmatory feedback. This is also consistent with social comparison theory, which posits that

individuals look to similar others as a means of understanding their own attitudes and experiences. The establishment and use of social network resources should facilitate spouse adjustment. The social support that a coffee club or book club can provide a spouse should not be undermined. Group membership alone is enough to foster social identity (Vaux, 1992:199).

### **2.18.5 Host Country Nationals**

Interviewed spouses reported many stressful experiences involving interactions with host-country nationals (e.g., shopkeepers, landlords). Spouses who formed personal relationships with host-country nationals reported a better understanding of the host-country culture. Interaction with host-country nationals builds an appreciation of and sensitivity to cultural differences, so it seems likely that deeper relationships with host-country nationals would also facilitate adjustment. Relationships with host-country nationals help to bridge the gap between the two cultures. Relationships with host country nationals create a climate of mutual respect and understanding, increasing the likelihood of adjustment to the international assignment (Bell & Harrison, 1996:49).

In light of their research, De Cieri, Dowling and Taylor (1991:379) argued that, given social supports essential role to the success of international assignments, and because the cost associated with assignment failure outweigh those in relation to support assistance, companies must seriously consider providing adequate support for not only the expatriate but also for the expatriates' accompanying family members. A study completed by Ali, *et al.* (2003:565) on intercultural adjustment among expatriate spouses, the overall received support, for instance, intercultural training and information resources, contributed not only to both the psychological and socio-cultural adjustment of expatriate spouses, but also to the amount of intercultural interaction they engaged in.

### **2.18.6 Husband's Company and Pre-Departure Training**

According to Shaffer and Harrison (2001:240) employer spousal support has been found to be significantly related to general adjustment to expatriate assignments, to reduce assignment withdrawal cognitions and to increase spousal willingness to accept long-term global assignments. Despite consistent findings, there is a lack of employer policies and programmes regarding spouses (Takeuchi, *et al.*, 2002:657,

Konopaske, *et al.*, 2005:406), in particular for male spouses. Although there is some evidence that the provision of language training and cross-cultural training to spouses is increasing (Cartus, 2007:36), the critical process of family integration into life in the host country is typically left to the spouse. Little attention has been paid to the lonely and painful experience endured by many spouses in adjusting to a foreign culture.

Multinational corporations are aware of the importance of the expatriate spouses while setting up and updating international human resource policies. Realising that the adjustment of the trailing spouses is as important as the expatriates themselves, most of the multinational corporations try to do their best to assist them. One interesting study that should be noted is that by De Cieri, *et al.* (1991:377). They found that the most important positive predictor of psychological adjustment of the expatriate spouses is company assistance. Unfortunately, they are not very specific about the nature and amount of support that is needed by the expatriate spouses in order for them to adjust and adapt to the different and new situations in the host country.

McNulty (2005:43) was of the opinion that spouses often become frustrated and feel helpless as they try to hire and supervise household help, find out where to buy food and household necessities, and locate churches, doctors, dentists, veterinarians, plumbers, electricians, and so on, without understanding the language or culture. The neglect of families in general and the silence on the household dimension of relocation has been described as unwarranted because the household is the main unit around which people organise their lives and the majority of moves involve moving entire households.

The findings from McNulty (2005:43) indicate that if an organisation can increase the likelihood of successful spouse adjustment, for example through understanding the problems encountered by expatriate spouses and providing appropriate support, it is likely to increase the associated probability of expatriate adjustment and resulting positive assignment outcomes.

Bronfenbrenner's Ecological Theory serves as a visual presentation of the adjustment processes that take place within and around the spouse.

## **2.19 SYSTEMS THEORY**

### **2.19.1 Bronfenbrenner's Ecological Theory**

Bronfenbrenner's Ecological Theory (Figure 2.4) holds that when concerned with human functioning, one can not only focus on the smaller elements of behaviour, but must regard human functioning in terms of systems. The impact of interdependent systems upon one another is seen to be of crucial importance. The individual can be seen as part of a structural framework. The individual is a subsystem within larger systems and as a system with certain subsystems of its own. The individual is the central point in the ecosystem; he or she can also be seen as interacting with others – the family, small groups and the community. The person in his or her context is thus the key issue. The ecological theory sees the interactions within and between systems and especially the patterns that emerge because of these interactions as an important aspect to study. It is assumed that all levels in the human ecosystem interact with one another and that boundaries between systems are semi-permeable, allowing information to flow across the boundaries between systems and making it possible for systems to influence one another. When a given level of functioning, such as the family, is examined, it is therefore necessary not to lose sight of the larger whole and the complexity of interactional patterns between systems. The individual is also represented in terms of subsystems. The assumption here is that the interaction between the person's physiological, intrapersonal, verbal and non-verbal functioning must be taken into account, as well as his or her interaction with other systems that form part of a hierarchy of larger systems (Meyer, Moore & Viljoen, 2003:472).

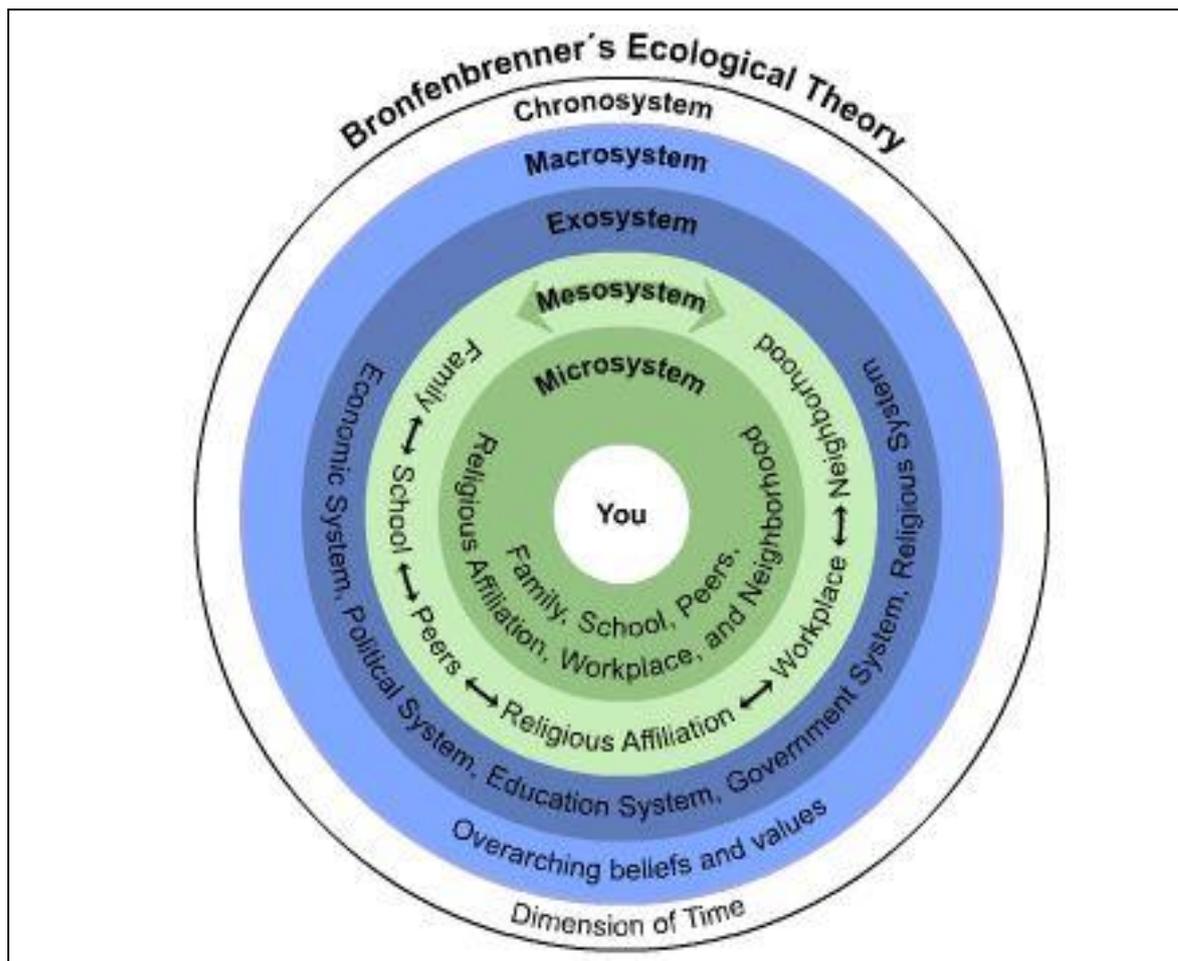


Figure 2.4 Bronfenbrenner's Ecological Theory

Source: Meyer, Moore and Viljoen (2003:472)

### 2.19.2 Family Systems Theory

Family systems theory provides a framework for understanding the social dynamics that emerge in a family. Family systems theory sees the family as a whole and the members as interdependent; therefore, each individual member is strongly influenced by the structure, organisation, and transactional patterns of the family system (Miller, Keitner, Bishop & Epstein, 1985:170). A healthy family system is organisationally complex, open, and adaptive and is an information-processing system. Miller, *et al.* (1985) contended that families are organisationally complex because they establish networks of interdependent causal relationships that sustain themselves through constant feedback. Family systems theory operates in a circular pattern; thus, the effects of the individual on the family provide feedback to create a cycle of interaction.

Family systems are considered open since the individual members and the unit can be influenced by the internal and external environment. They are adaptive because they meet the demands of the changes that impact them. In family systems, society is the environmental context and individual family members are the specific components. The environmental context provides the framework for adaptation. It has been said that just because a family system can adapt in one society does not mean it can adapt in another. Finally, family systems are information processing systems because they are constantly informing the other members of the proper information to achieve the specific goals for the unit (Minuchin, 1985:290).

According to the family systems theory, the expatriate spouse does not live in isolation. The spouse is part of a number of systems. These systems that she is part of are all part of a larger intricate web of systems that influence one another. The spouse is part of micro system, meso-system and supra-system as we can see in Figure 2.4. When change takes place within one system it will result in change in another system. It is like dropping a stone into a pool of water, a small circle starts at the focal point but soon becomes bigger and bigger. In the same sense this could be seen as a metaphor for the spouse's expatriation experience and how the spouse adjusts to the host country. Adjustment in one of the spouse's systems would lead to adjustment in another system that the spouse is part of. Expatriate spouses' adjustment cannot be understood if only one part is studied in isolation. It is therefore important to take into consideration all of these elements in order to get a clear understanding of what adjustment experiences for an expatriate spouse entail.

## **2.20 CHAPTER SUMMARY**

This chapter served as the literature review for my research. It is well established in the literature that the adjustment of the spouse has a significant impact on the way in which the expatriate and the family adjusts to the host country. The adjustment of the spouse therefore has far-reaching consequences and it is worth researching how these adjustments take place, especially from the spouses' perspective.

Completing the literature review on the research topic was of cardinal importance as it served as the knowledge base on which to build my research.

## **CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY**

### **3.1 INTRODUCTION**

The term 'research' is defined by Leedy and Ormrod (2005:2) as "a systematic process of collecting, analysing, and interpreting information (data) in order to increase our understanding of the phenomenon about which we are interested or concerned". This chapter describes the systematic process which was followed in order to answer to the research questions and goals involved in this study. The research aims, design and methods are explained, along with the ethical guidelines that were followed throughout the process.

This study focused on how the expatriate spouse experienced cross-cultural adjustment to the host country. The literature study explored existing research with regard to the range of factors impacting on the spouse's cross-cultural adjustment to the host country. What was evident in the literature study is the need for more research to be done regarding this topic, but specifically from the spouse's perspective. Prior research was done from a Human Resource Management perspective focusing more on the expat and not including the spouse in the research. This study was done from a psycho-educational perspective focusing solely on the personal experiences of the spouse. The purpose of this research study was to research the different cross-cultural adjustments that the expatriate spouse experiences when living in the host country and how these adjustment experiences influence the expatriate spouse as a person. As I was living in a foreign country and spending time with other expatriate spouses, I started contemplating the idea of contributing to the existing body of knowledge that exists about the immense adjustment difficulties these spouses were experiencing every day. I was in the privileged position to do research on a topic that interested me greatly and furthermore I also had the potential to help spouses with their adjustment difficulties.

### **3.2 SELECTION OF RESEARCH DESIGN**

A qualitative approach is well suited for my study investigating the expatriate spouse's experiences regarding cross-cultural adjustment when in a host country. By employing a qualitative approach, my study provides a deeper understanding of the cross-cultural

adjustments that an expatriate spouse experiences, but specifically from the spouse's perspective.

The research question dictates the methodological approach that is used to conduct the research. The methodological orientation of this study is qualitative in nature. The qualitative approach allows researchers to obtain deeper insight into the inner experiences of participants, to determine how meanings are formed and to discover rather than to test variables. Qualitative research aims to describe and explore, to describe and explain, to understand and to examine and discover. Many qualitative studies are exploratory in nature and usually focus on individuals, groups, organisations or systems (McMillan & Schumacher, 2010:397).

Several key characteristics can be identified in qualitative designs, namely:

- Researchers strive to understand the meaning people have constructed about their world and their experiences;
- The researcher is the primary instrument for data collection and data analysis; and
- The product of a qualitative inquiry is richly descriptive.

According to McMillan and Schumacher (2010:35), qualitative design may be interactive or non-interactive. This study will be a qualitative interactive design. An interactive qualitative inquiry can be defined as "an in-depth study using face-to-face techniques to collect data from people in their natural setting". The researcher interprets phenomena in terms of the meaning people bring to them (McMillan & Schumacher, 2010:320). The focus of qualitative research is to access the subjective experience of the participants. To achieve this, the researcher needs to make a concrete effort to identify and temporarily set aside his/her own assumptions (Fischer, 2009:584).

To investigate each participant's individual experience of cross-cultural adjustment to the host country, I used in-depth interviews and a focus group session for collecting data on participant's perspectives. Open-ended questions were used to allow a less formal setting and more spontaneous interaction between myself and the participants. The participants were given opportunity to respond in their own words and experiences with the necessary ethics considered. The interviews were audio-recorded.

### 3.3 SELECTION OF SAMPLE

Although a small part of the population, the sample must have properties which make it representative of the population (Bless & Higson-Smith, 2000:37). When choosing a sample/ a participant/ a case, there are a number of aspects to take into account, namely; the kind of study the researcher wishes to conduct, where the participant is located, what will yield optimum understanding, saving travel costs and time. When choosing a case study it is not necessary to seek one that is typical of other cases. Each case is unique, so no one is typical of another; however, there may be congruence between cases in similar contexts (Simons, 2009:30).

The research site of this study was Rome, Italy which is home to many expatriates. A country like Italy requires a number of adjustments to take place from individuals that are moving there. Language and driving skills are some of the areas of adjustment to name but a few. In this study, purposeful sampling was used. I wished to select information-rich cases for in-depth study (Patton, 1998, in McMillan & Schumacher, 2010:378). The benefits and logic of purposeful sampling allow a few cases, studied in depth, to give many insights about a topic. Participants were selected by purposeful sampling and chosen for their likelihood to be 'knowledgeable and informative' about the phenomena the researcher was investigating. As all expatriate spouses are likely to be 'knowledgeable' about the effects of expatriation the researcher's criteria for selection included:

- The husband's career abroad should be the main reason for expatriating;
- The participant must be a first time expatriate;
- The participant should not have been living in Rome for more than one year; and
- The participant should be fluent in English.

Participants were selected by sending out electronic communications to the parent community at an international school in Rome. In this communication, the scope and the aims of the study were explained, as well as the criteria for selection. If participants were interested in participating in this study, they were asked to reply formally to me, the researcher. My contact information was provided in the communication (Appendix B). Subsequently, I made contact with possible participants and arranged a meeting for us to meet. During this meeting, I explained what would be expected of them during

the research process. If participants were willing to partake in the study, I obtained written, legal consent form them and arranged for a follow-up meeting to complete the interview. Interviews were conducted individually with each participant. After the interviews were done, a focus group session took place on a date that suited all participants.

### 3.4 METHODOLOGY

In this section, the methodology and research design that was used in this study is discussed. Qualitative research was selected for my research because it gives the researcher the chance to examine issues, thoughts and emotions in more detail and in greater depth. In my study, I chose qualitative research as it best fits my research aims and would be most effective to obtain data regarding my research questions.

#### 3.4.1 Overview of Research Design



Figure 3.1 Process of Research

### **3.4.2 Research Philosophy**

There are different types of qualitative research. Johnson and Christensen (2004:361) posited that phenomenology, ethnography, case study and grounded theory are the four most important types. Of these four types, case study was selected for the current study.

A case study is a particularly appropriate qualitative methodology for exploring issues of educational practice (Simons, 2009:5). It is widely accepted as a research method for evaluating complex educational innovations in specific contexts, as well as social and educational phenomena in general (Simons, 2009:13). It is a research method which, through the portrayal of a single instance locked in time and circumstances, communicates enduring truths about the human condition (Simons, 2009:20). A 'case' refers to a specific, a complex and a functioning thing (Simons, 2009:20). Its primary purpose is to investigate the particularity and the uniqueness of a single case, coming to understand its activity within specific events (Simons, 2009:19). A researcher gathers extensive information about the life of an individual and investigates developing assumptions by analysing the events of the person's life (Schaffer & Kipp, 2010:16).

In my research, I chose five (5) expatriate spouses who all met the required criteria and served as my case study participants. Although unintentional, all the respondents were women. These case studies were able to provide rich, first-hand information on how the participants experienced cross-cultural adjustment to the host country. The evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as more robust (Yin, 2009:53).

### **3.4.3 Data Collection Tools**

#### **3.4.3.1 Interview**

Individual interviews are the most widely-used data collection strategy in qualitative research (Sandelowski, 2002:104, Nunkoosing, 2005:678). Researchers typically choose individual interviews to collect detailed accounts of participants' thoughts, attitudes, beliefs, and knowledge pertaining to a given phenomenon (Fielding, 1994:4; Speziale & Carpenter, 2003:27; Loiselle, Profetto-McGrath, Polit & Beck, 2007:34). If during interviews, questions are formulated correctly, participants' expressions of their

experiences will reflect their reality (Morse, 2000:538; Sandelowski, 2002:106). There is also the presupposition that participants will be able to formulate answers to the questions. Although assumed to be a 'generic' data collection method, individual interviews come in a variety of forms (e.g. structured, semi-structured). Each interviewing approach assumes a philosophical orientation and may be more or less appropriate according to context and the qualitative methodology used (Fielding, 1994:6). The interview is defined by The University of Texas at Austin (2007:n. p.) as an 'a one-on-one directed conversation with an individual using a series of questions designed to elicit extended responses. Because this method allows you to probe for greater depth or explanation, simple yes/no questions or fixed-response questions are typically not used'.

For this study, semi-structured, in-depth interviews were used, although I decided on the exact wording and the sequence of questions during the interview. Although the interviews took on the appearance of a normal everyday conversation, they were in fact a controlled conversation as I kept in mind that I wanted to elicit experiences and attitudes which are relevant to the problem. Questions were open-ended to elicit detailed responses rather than yes/no answer.

According to McMillan and Schumacher (2010:444), the purpose of the interview in qualitative research is to:

- Obtain present perceptions of activities, roles, feelings, motivations, concerns and thoughts;
- Obtain future expectations or anticipated experiences;
- Verify and extend information obtained from other sources; and
- Verify or extend hunches and ideas developed by participants or researchers.

For the purpose of this study, the chosen semi-structured interviews were face-to-face. The primary purpose of this approach was to generate detailed, descriptive information that would augment and clarify the limited current knowledge about spouse adjustment. The interviews assisted me to gain insight into the participants' attitudes, ways of thinking and in-depth information regarding the experience of cross-cultural adjustment to the host country. I used a standardised set of questions as a guideline but allowed myself to probe more deeply into unique answers. The interviews revolved

around what adjustment was needed by the spouse, for example, its nature or composition, as well as the how and why of adjustment. It included the processes that were involved and the factors that have led some interviewees to adjust more or less effectively than others. All interviews were recorded and transcribed verbatim. After collecting the individual data, the data was systematically analysed in order for conclusions to be made. The data was also used to address the aims of my research as stated in Chapter 1.

#### 3.4.3.2 Focus groups

Focus groups are used by researchers worldwide to explore a range of phenomena (Brajtman, 2005:73; Oluwatosin, 2005:33; Van Teijlingen & Pitchforth, 2006:30). The primary goal of this method is to use interaction data resulting from discussion among participants (e.g. questioning one another, commenting on each other's experiences) to increase the depth of the inquiry and unveil aspects of the phenomenon assumed to be otherwise less accessible (Freeman, O'Dell & Meola, 2001:277; Van Eik & Baum, 2003:282; Duggleby, 2005:832). Group interactions may accentuate members' similarities and differences and give rich information about the range of perspectives and experiences. However, regrettably, they are often used as an 'inexpensive' substitute for individual interviews (Hollander, 2004:603; Barbour, 2005:742), and group transcripts are analysed for the content of 'individual' discussion (Hyden & Butow, 2003:306). Increased attention to interaction analysis and the unique insights obtained about the phenomenon in this process are critical to reach the full potential of this method (Freeman, 2006:491).

Focus group data are the product of context-dependent group interactions (Hollander, 2004:602; Duggleby, 2005:832; Lehoux, Blake & Daudelin, 2006:2091). Hollander (2004:603) discussed four types of social contexts that may be created within a group and influence members' interactions (type and amount): (1) associational context (i.e. a common characteristic that brings the participants together), (2) status context (i.e. positions of participants in local or societal status hierarchies), (3) conversational context (i.e. flow of the discussion and types of discussion within the group), and (4) relational context (i.e. degree of prior acquaintance with participants). According to the contexts created within a particular group, participants may or may not disclose certain information (Kidd & Parshall, 2000:293; Hollander, 2004:603). If focus groups are seen

as a 'social space' where participants construct their experiences based on how the discussion evolves and how participants interact, then an additional layer of data may be obtained (Lehoux, *et al.*, 2006:2091).

During the focus group session participants shared their experiences which were a reflection of their reality. The sharing of similar experiences served as a platform that helped participants to feel that they are not alone in what they are experiencing. The focus group also helped to normalise emotions that were experienced by participants.

#### 3.4.3.3 Combining interviews with focus groups

Although attention is increasingly placed on the combination of quantitative and qualitative methods, few authors (Barbour, 1998:352; Morse, 1999:393) have explicitly addressed the implications of combining qualitative data collection methods. The disproportionate number of methodological papers addressing qualitative-quantitative triangulation vs. qualitative-qualitative triangulation may be due to a misperception that combining methods within the same research paradigm is less paradoxical than integrating methods across paradigms (Barbour, 1998:352).

A search of the Cumulative Index to Nursing and Allied Health Literature (CINAHL) database (1984-2007) using the keywords 'focus group' and 'individual interview' reveals that many researchers favour the combination of these methods. Although focus groups and individual interviews are independent data collection methods; their combination can be advantageous to researchers as complementary views of the phenomenon may be generated. A reading of various studies reveals three broad rationales for this combination: (1) pragmatic reasons, (2) the need to compare and contrast participants' perspectives (parallel use), and (3) striving toward data completeness and/or confirmation (integrated use). Some researchers combine both methods for practical or pragmatic considerations. Individual interviews and focus groups may also be combined for the purposes of data completeness and/or confirmation (Adami, 2005:19; Halcomb & Andrew, 2005:71).

When seeking data completeness, it is assumed that each method reveals different parts of the phenomenon of interest (complementary views) and contributes to a more comprehensive understanding (expanding the breadth and/or depth of the findings).

For example, individual interviews may be used to explore personal experiences, whereas focus groups may be used to examine opinions and beliefs about the phenomenon (Molzahn, Starzomski, McDonald & O'Loughlin, 2005:82). When authors combine individual interviews and focus groups for confirmation, the data obtained by one method are anticipated to corroborate those acquired with the other. When performed rigorously, the integration of individual interview and focus group data is a productive strategy that leads to an enhanced description of the phenomenon's structure and its essential characteristics.

I chose to combine interviews with a focus group session because I wanted the findings from the focus group to support and complement the findings from the interviews and vice versa. This helped with the completeness of the study. Because I explored personal experiences of spouses, I wanted participants to truly engage in the research. Using interviews and focus group sessions were of assistance in gathering information that assisted me to answer my research question.

### **3.5 DATA COLLECTION**

During the first stage of the empirical research, an interview was held with each of the participants. During the interview open-ended questions were asked. The interview assisted the researcher to gather rich information about the expatriate spouse's personal experience since her arrival in the host country. The purpose of the interview was to identify common themes in the expatriate spouses' cross-cultural adjustment. Interviews were recorded in order to process information received and highlight important aspects more accurately. In the second stage of the research, the same participants took part in a focus group session.

An analysis and interpretation of each participant's information was conducted. Participants' responses to questions were coded in order to identify concepts and themes. Inferences were drawn about the factors that influence these participant's experiences of cross-cultural adjustment.

As an expatriate spouse living in Italy myself, I had to guard against allowing my own experiences and perceptions to jeopardise the validity of the research. This was done in three ways. Firstly, I kept a written record of my own experiences raising the awareness of my own stance, attitudes and possible bias. Secondly interviews were

recorded and transcribed verbatim. Finally, I occasionally checked back with participants to confirm facts and interpretations. These techniques are all recommended for ensuring qualitative research reliability (McMillan & Schumacher, 2010: 388).

### **3.6 DATA ANALYSIS AND INTERPRETATION**

I carefully analysed the data and information collected from the interviews and the focus group session with participants more than once to eliminate the oversight of important aspects. I focused on the raw data obtained during the interviews and focus group. The data obtained from the sessions, were dealt with in terms of my research aims and in order to answer the research questions stipulated in Chapters 1 and 3. I specifically concentrated on emotions shown by the participant as well as the specific words that they used to describe their personal experiences. I wanted to identify what adjustments the spouse had to make since moving to the host country and secondly how these adjustments had influenced her as a person. Data processing in terms of mapping the data, interpreting the obtained data and results presented was done in the analysis stage of the research study. With this qualitative study, the data was categorised and interpreted in terms of common themes. Eventual synthesis into an overall portrait was aimed for.

### **3.7 ETHICAL CONSIDERATIONS**

Powell (2011:1) stated that research ethics is essentially concerned with the principles of right and wrong conduct during research, which reflects various epistemological paradigms and methodological practices within particular scientific, social and cultural contexts. The researcher should be cognisant that ethical considerations need to be considered and respected throughout the research process. Powell (2011:3) stated that research methodology and ethics are integrally linked; ethically sound techniques add to the value of research and, conversely, methodological soundness improves ethics. Qualitative researchers are morally bound to conduct their research in a manner that minimises potential harm to those involved in the study. As such, researchers need to convey with confidence to participants that they will not come to harm as a result of involvement in research (Gay, Mills & Airasian, 2008:409).

Before I started planning my research, I obtained formal approval from the Ethics Committee of the University of South Africa, also known as UNISA. Prior to my research, I also clarified the nature of my research and made sure all participants knew what the responsibilities and limitations of the participants and researcher were. I fulfilled the role of the researcher in this study. The ethical procedures and considerations were of utmost importance throughout this study. When I personally made contact with participants, I stressed that participation would be voluntary at all times. It was made clear to all participants that they were free to withdraw from the study at any point in time, without consequences, if they felt the need to do so or if they were becoming uncomfortable for whatsoever reason. Based on the willingness of the participants to partake in the research project and after establishing whether possible participants adhered to the inclusion criteria, a consent letter containing all ethical considerations was given to them. Only after receiving the written consent letters back from participants did I commence with the research sessions with participants.

With the participants' consent all interviews and focus group sessions were recorded. This supported me in properly reflecting on and documenting the sessions. In order to overcome the threat to confidentiality, each recording was saved on a password protected computer. Back-up recordings were saved on an external storage device which was locked away. Participants' real names were not used; instead, a pseudonym was given to each participant in order to protect their personal identity. Prior to the onset of the study, participants were made aware of the fact that all information shared in the interviews would be kept confidential, unless harm to any person was suspected or anticipated, in which case confidentiality might be breached. As set out in various consent forms, confidentiality issues were explained in full to all participants. During the focus group, each participant was asked to sign a confidentiality agreement to ensure that information shared in the focus group would not be discussed with any individual once the focus group disbanded.

I undertook not to make use of any stereotypical beliefs, values and thoughts based on previous experiences whilst completing the interviews and focus group. Each individual participant's thoughts and feelings were treated with the needed empathy and respect. Discrimination regarding gender, race or religion, as far possible was avoided in my research study. As a result of working with people's real life

circumstances, it must be noted that there could be the possibility for potential harm in my work. I undertook to attempt all reasonable methods to counter act any harm to participants and other relatives as far as possible.

### **3.8 CHAPTER SUMMARY**

This chapter established that a qualitative research design was best suited for the nature of my research study. The feelings, perspectives and experiences of five participants were explored in depth through the techniques of face-to-face, semi-structured, open-ended interviews and one focus group session. Data obtained from the participants' interviews were collated into categories and compared with information gathered by the literature study, and to each other. These findings are discussed in Chapter 4.

## **CHAPTER 4: DATA ANALYSIS AND INTERPRETATION OF RESEARCH FINDINGS**

### **4.1 INTRODUCTION**

In Chapter Three, I explained in detail what method I used in this research. I also motivated why this research method is best suited for this study. In this chapter I will state the findings of the study as well as analyse these findings in order to prove my research statement. The research question was:

What are the cross-cultural adjustments expatriate spouses' experience in a host country?

### **4.2 RESEARCH ANALYSIS**

To begin the research, I compiled a list of the names of participants that fitted the criteria and were willing to take part in the research study. I contacted each participant and scheduled an appointment with them. At the beginning of the interview, I gave a brief introduction to provide background of the study to each participant. I explained that I was doing research on individual experiences therefore there were no right or wrong answers. I asked participants to be as honest as possible. Some participants mentioned that they did not know what to expect while another participant thought she should convince me of how well she has adjusted.

How participants responded to the questions that they were asked, is not in the hands of the researcher. I cannot discredit the answers of a participant just because it is not in line with what I expected or want for the study. Although I had a pre-planned interview guide and I tried to ask the questions in order, it was not always possible. I tried to stay with the participant as much as possible which resulted in my asking questions at appropriate times rather than sticking to the numbering of the questions. All the participants were talkative and very willing to share their cross-cultural adjustment experiences with me. By asking open ended questions, I received valuable information relevant to my research. The answers I received from spouses were rich with personal information.

The questions that were asked during the interviews were based on research that was done by Shaffer and Harrison (2001). As explained in the literature review seen in

Chapter 2, Shaffer and Harrison's identity disruption theory categorised spousal adjustment under three main headings namely:

- Situational identity
- Social identity
- Personal identity

I was interested in how participants experienced adjustment within these three categories.

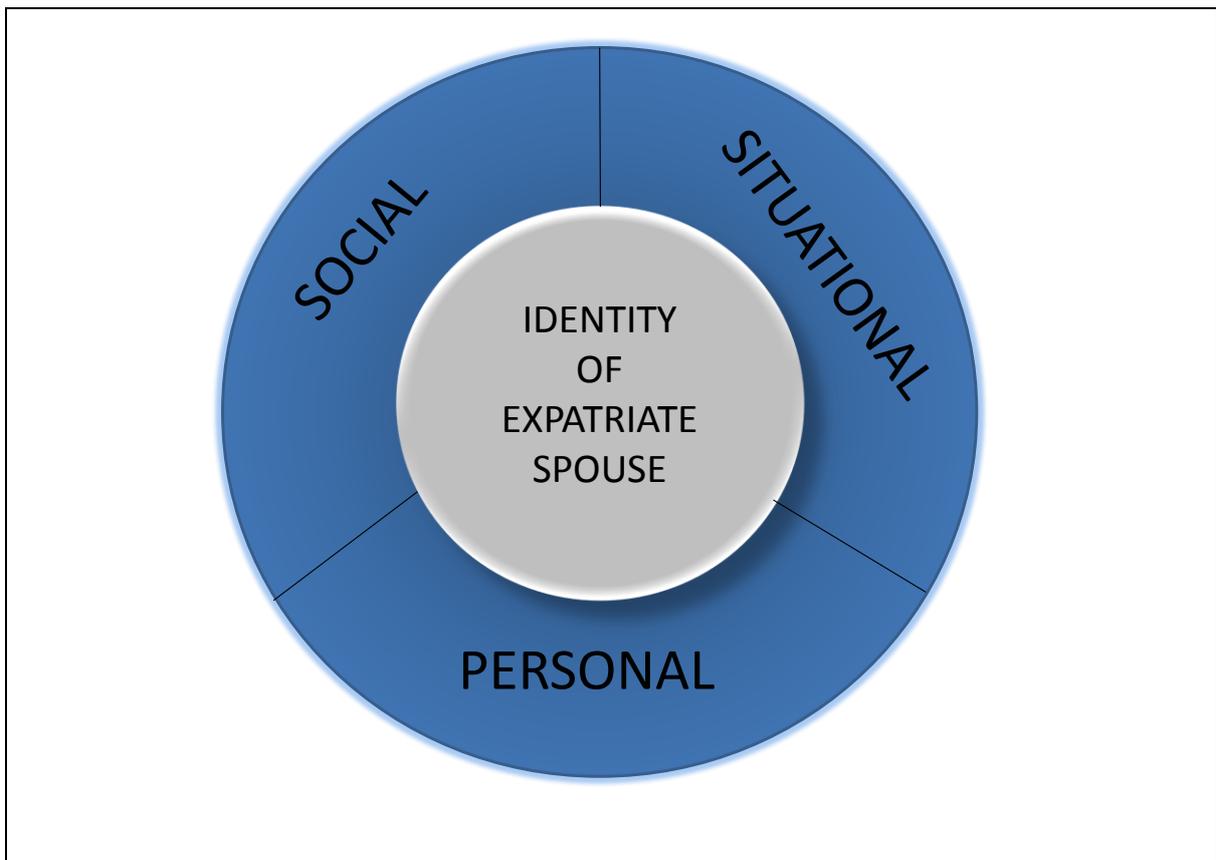


Figure 4.1 Three identities of expatriate spouses

Appendices C and D provide the list of questions that were asked during the interviews and focus group session.

### 4.3 PROCESSING RESULTS

In the following section an explanation is given of how the results of this study were processed.

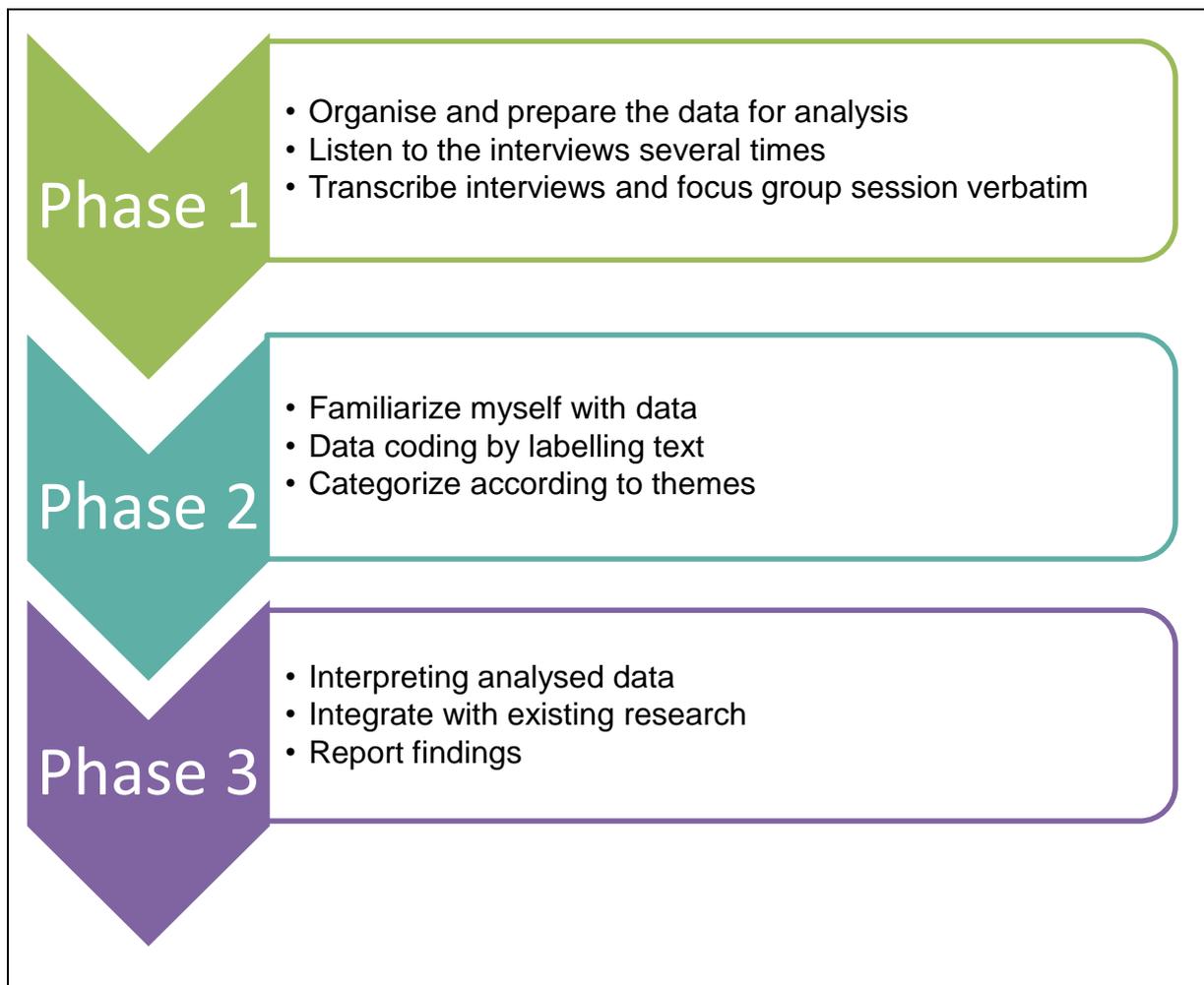


Figure 4.2 Phases of data analysis.

Phase one of the data analysis was to organise and prepare the data for analysis. This was done by listening to the interviews that I recorded several times in order to become well accustomed with the answers of the participants. After I listened to the interviews, I transcribed them verbatim to produce five electronic transcripts (totalling 62 pages). I also transcribed the focus group session verbatim also producing an electronic transcript (totalling 20 pages). Transcribing the interviews helped me to obtain an in depth understanding of the content of the interviews and to make sure no information got lost.

Phase two consisted of reading through the data meticulously. I started systematically reading through the interviews of each participant starting with participant 1 and ending with participant number 5. I then read the focus group transcripts. After reading each participant's transcript once, I read it again highlighting all the spouses' experiences that involved some form of psychological or behavioural adaption to their international assignment. I also highlighted responses in the focus group session that supported

answers given by spouses during the individual interviews. This allowed me to categorise the data and delineate themes that emerged. By following this process, I became familiar with each participant’s response and it helped me to get a general sense of the participant’s expatriate experience.

During the third phase, I interpreted the analysed data. I was able to make inferences between existing research and new research that emerged in this study. Finally, I was able to report the findings as was done in this chapter.

#### **4.4 PARTICIPANT PROFILE**

In total five participants took part in this study. These participants were a group of expatriate spouses living in Rome, Italy. Table 4.1 below provides the details.

Table 4.1: Participant profiles

<b>Number of participant</b>	<b>Country of origin</b>	<b>Home language</b>	<b>Number of months living in Rome</b>	<b>First time expatriate</b>	<b>Age of participant</b>
One	South Africa	English	10 months	Yes	35
Two	South Africa	English	10 months	Yes	32
Three	England	English	11 months	Yes	46
Four	South Africa	Afrikaans	8 months	Yes	38
Five	South Africa	Afrikaans	10 months	Yes	37

These five spouses met the inclusion criteria set out in this study which were the following:

- The expatriate’s career abroad should be the main reason for expatriating;
- The participant must be a first time expatriate;
- Participants should not been living in Rome for more than one year; and
- The participant should be fluent in English.

#### **4.5 SUMMARY OF RESEARCH FINDINGS**

The following section provides an overview of the research findings.

#### 4.5.1 Personal Identity

<b>QUESTION 1</b>	
<b>Has there been a change in the roles that you fulfil as a person?</b>	
<b>Response</b>	<b>Themes</b>
<p>Four of the five spouses went from being employed in the home country to being unemployed in the host country. The other spouses' employment status remained unchanged.</p>	<p><b>Positive responses:</b></p> <ul style="list-style-type: none"> <li>• More relaxed around the house</li> <li>• No rigorous routine</li> <li>• More time available to attend to children</li> <li>• More time for social media</li> </ul> <p><b>Negative responses:</b></p> <ul style="list-style-type: none"> <li>• Not able to contribute financially towards the household</li> <li>• Power moved to husband</li> <li>• Does not see herself as part of society</li> <li>• Missed interaction with work colleagues</li> <li>• Missed intellectual stimulation of work environment</li> <li>• No sense of purpose in life</li> <li>• No sense of accomplishment</li> <li>• Lag behind in career when eventually enters back into career</li> <li>• Loss of self-worth</li> <li>• Feelings of guilt</li> <li>• Difficult finding routine</li> <li>• Felt trapped, cannot escape new role as primary caretaker of children</li> <li>• No support system for example grandparents, friends, domestic worker</li> </ul>

**QUESTION 2****Has there been a change in the way you think about yourself?**

Response	Themes
<p>All of the spouses experienced a change in the way that they think about themselves. Some of the changes in thoughts were positive while others were negative.</p>	<p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Improved sense of humour</li> <li>• Outlook on life more positive</li> <li>• Replaced negative thoughts with positive thoughts</li> <li>• Personal growth</li> <li>• Improved self confidence</li> <li>• Mentally stronger than before expatriation</li> <li>• Changed thought pattern about self already in South Africa, made adjustment easier</li> <li>• Thoughts about the world changed</li> <li>• Expatriate experience is an enriching experience</li> </ul> <p><b>Negative:</b></p> <ul style="list-style-type: none"> <li>• Mundane tasks result in feelings of inferiority</li> <li>• Increased self-doubt</li> <li>• Loss of identity</li> <li>• Constant comparison with other spouses</li> <li>• Not good enough</li> <li>• Increased levels of uncertainty about self</li> <li>• Accept things you cannot change</li> </ul>

**QUESTION 3****Has there been a change in the way you feel about yourself?**

Response	Themes
<p>All of the spouses experienced a change in the way that they feel about themselves. As a result they changed the way they feel</p>	<ul style="list-style-type: none"> <li>• Increased levels of frustration</li> <li>• Loss of control over life</li> <li>• Life is very limited, cannot do activities like she used to in the home country</li> <li>• Cannot cope with new changes</li> </ul>

about other people and their surrounding environment.	<ul style="list-style-type: none"> <li>• Decrease in sense of responsibility</li> <li>• Weary of trying new things</li> <li>• Decrease in ability to help children at school</li> <li>• Increased levels of anger</li> <li>• Helplessness</li> <li>• Concerned about children's schooling</li> <li>• Concerned about repatriating</li> <li>• Decreased levels of patience with children</li> <li>• Difficulty in disciplining children</li> </ul>
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**QUESTION 4**

**Has there been a change in the way you do things?**

<b>Responses</b>	<b>Themes</b>
All of the spouses experienced a change in their behaviour. These changes in behaviour were experienced on a continuum; some were very drastic while others were more subtle.	<p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Increase in adventurousness</li> <li>• Move out of comfort zone more often</li> <li>• Increase in cultural curiosity</li> <li>• Increase in flexibility</li> <li>• More open-mindedness</li> </ul> <p><b>Negative:</b></p> <ul style="list-style-type: none"> <li>• Less outgoing in host country than in home country</li> <li>• Fearful of driving in host country</li> <li>• Decrease in spontaneity</li> <li>• Increase in domestic duties</li> <li>• Increase in duties pertaining to children because of absent father</li> </ul>

**QUESTION 5**

**Has there been a change in your self-talk?**

<b>Response</b>	<b>Themes</b>
Three of the five spouses experienced that their self-talk changed during the expatriate	<ul style="list-style-type: none"> <li>• Became aware of self-talk for the first time in host country</li> <li>• Had to constantly motivate herself</li> </ul>

<p>process. The spouses underestimated the value of a positive self-talk.</p>	<ul style="list-style-type: none"> <li>• Change negative self-talk to positive self-talk</li> <li>• Not in comfort zone anymore</li> <li>• Only internal motivation, no external motivation</li> <li>• Realised the value of positive self-talk</li> <li>• Positive self-talk aided with adjustment experience</li> <li>• Increase in patience with self</li> </ul>
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#### 4.5.2 Situational Identity

<b>QUESTION 1</b>	
<b>Is there a difference between the host country and the home country concerning cultural novelty?</b>	
<b>Responses</b>	<b>Themes</b>
<ul style="list-style-type: none"> <li>• Language</li>   <li>• Inadequate skills to cope in host country</li>   <li>• Host country nationals</li>   <li>• Public transportation</li>   <li>• Religion</li> </ul>	<ul style="list-style-type: none"> <li>• Frustrated because of language barrier</li> <li>• Cannot read labels on food and cleaning products</li> <li>• Constantly felt unintelligent</li> <li>• Cannot be spontaneous and interact with host country nationals</li>   <li>• Felt like living in a bubble</li>   <li>• Rude</li> <li>• Not accommodating of other nationalities</li>   <li>• Not present in South Africa</li> <li>• Present in England and host country</li>   <li>• Different to home country</li> <li>• Food restrictions in restaurants</li> <li>• Difficult sourcing food products</li> </ul>

<ul style="list-style-type: none"> <li>• Culture</li> </ul>	<ul style="list-style-type: none"> <li>• Disapprove of meat display in supermarkets</li> <li>• Difficult to find a church with the same belief</li> <li>• Language barrier in church</li> <li>• Negative influence not being part of a church</li> <li>• Experienced a spiritual void</li> <li>• Missed the support the church provided</li> <li>• Missed the fellowship with small group</li> <li>• Conservative society in home country versus liberal society in host country</li> <li>• Decreased work ethic</li> <li>• Not punctual</li> </ul>
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**QUESTION 2**

**How long is the expatriate assignment for?**

<b>Responses</b>	<b>Themes</b>
<p>The spouses confirmed they were uncertain about the duration of the assignment.</p>	<p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Knew about uncertainty of dates before coming on assignment</li> <li>• Easier to accept because it is not a permanent assignment</li> <li>• Make the most of time in host country</li> <li>• Cannot live for the day when they return</li> </ul> <p><b>Negative:</b></p> <ul style="list-style-type: none"> <li>• Not concerned with learning the language and making friends</li> <li>• Adjusting not a priority</li> <li>• Waiting for the day to go home</li> </ul>

<b>QUESTION 3</b>	
<b>Is your standard of living the same in the host country as in your home country?</b>	
<b>Response</b>	<b>Themes</b>
Four of the spouses experienced that their living conditions and standard of living had improved	<ul style="list-style-type: none"> <li>• Increased financial freedom</li> <li>• Go on holiday more often</li> <li>• House with a pool and a bigger garden</li> </ul>
<b>QUESTION 4</b>	
<b>Did your husband's company support you with the expatriation?</b>	
<b>Response</b>	<b>Themes</b>
Four of the spouses were satisfied with the support they received from their husbands company. The company supported them every step of the way. While one spouse had to organise the expatriation with only the financial support from the company.	<p><b>Positives:</b></p> <ul style="list-style-type: none"> <li>• Provided car and temporary accommodation</li> <li>• Assisted with residency permits and other documents</li> <li>• Provided language lessons</li> <li>• Went on pre-assignment venture to host country</li> <li>• Extensive medical aid cover</li> <li>• Full medical examination before going on assignment</li> <li>• Monetary benefits</li> </ul> <p><b>Negatives:</b></p> <ul style="list-style-type: none"> <li>• No procedure in place to follow</li> <li>• Policy applied inconsistently</li> </ul>
<b>QUESTION 5</b>	
<b>Did you receive pre-departure training coming on the expatriate assignment?</b>	
<b>Response</b>	<b>Themes</b>

Four of the spouses went for pre-departure training.	<ul style="list-style-type: none"> <li>• Provided by the company</li> <li>• Aided with preparation for expatriation</li> <li>• Adjustment took longer than expected</li> <li>• Confidence increased</li> <li>• Increase in knowledge about host country</li> <li>• Cannot be fully prepared for expatriation</li> </ul>
<b>Physical Health</b>	This was not included as a question during the interviews, but all of the participants mentioned something about physical health in their answers to other questions so it has been included here.
<b>Response</b>	<b>Themes</b>
The spouses experienced a variety of symptoms pertaining to their physical health since arriving in the host country. Some of these symptoms influenced the adjustment experiences of the spouses.	<ul style="list-style-type: none"> <li>• Increase in amount of times falling ill</li> <li>• Increase in duration of illness</li> <li>• Severe tiredness</li> <li>• Skin rashes</li> <li>• Insomnia</li> <li>• Weight loss</li> <li>• Allergies</li> </ul>

#### 4.5.3 Social Identity

<b>QUESTION 1</b>	
<b>Has the expatriation influenced your relationship with your children?</b>	
<b>Responses</b>	<b>Themes</b>
All of the spouses experienced that their relationship with their children changed.	<p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Increase in family activities</li> <li>• More interaction between mothers and children specifically</li> <li>• More open communication</li> <li>• Mother more engaged with children during activities</li> </ul> <p><b>Negative:</b></p>

	<ul style="list-style-type: none"> <li>• No support system for example grandparents and friends</li> <li>• Missed out on having a relationship with extended family for example grandparents</li> <li>• Children more dependent on parents</li> <li>• Decrease in patience with children</li> <li>• Long school day of children</li> <li>• Concerned about child's school career</li> <li>• Increase in responsibilities of mother</li> <li>• Mothers attitude towards expatriation influence child's attitude towards expatriation</li> </ul>
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**QUESTION 2**

**Has the expatriation influenced your relationship with your husband?**

<b>Responses</b>	<b>Themes</b>
<p>The expatriation placed all of the marriages under pressure. The spouses were of the opinion that a marriage needs to have a good foundation when going on an expatriate assignment.</p>	<p><b>Negative:</b></p> <ul style="list-style-type: none"> <li>• Placed marriage under immense pressure</li> <li>• Increase in stress levels of the husband</li> <li>• Husband worked very long hours</li> <li>• Increase in stress levels of the wife</li> <li>• Increase in conflict</li> <li>• Increase in irritability with one another</li> <li>• Aggravated small problems in marriage</li> <li>• No support structure for example friends or church</li> <li>• Spouse afraid of giving up independent life</li> <li>• Decrease in time spent with each other</li> </ul> <p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Brought husband and wife closer to each other</li> </ul>

**QUESTION 3**

**Did you have the support of your family members coming on the assignment?**

<b>Responses</b>	<b>Themes</b>
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<p>All of the participants that took part in this study had the support of their family members. Their family members approved of their choice to become expatriates.</p>	<ul style="list-style-type: none"> <li>• Motivated them to continue through difficult times</li> <li>• Doubts decision when family in home country goes through a difficult time</li> <li>• Saying goodbye still difficult</li> <li>• Helped with adjustment to host country</li> </ul>
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**QUESTION 4**

**Do you interact or know host country nationals?**

<b>Responses</b>	<b>Themes</b>
<p>Four of the five spouses said that they interact with host country nationals.</p>	<ul style="list-style-type: none"> <li>• Met host country nationals at children’s school</li> <li>• Felt community is accepting of her</li> <li>• Felt less lonely</li> <li>• Improved mood</li> <li>• Supported adjustment process</li> <li>• Aided in learning Italian</li> <li>• Enriched cultural experience</li> </ul>

**QUESTION 5**

**Do you interact or know other expatriates?**

<b>Response</b>	<b>Themes</b>
<p>All of the spouses said they interact with the expatriate community. The expatriate spouses got together on a regular basis. These meetings were beneficial to all expatriate spouses.</p>	<p><b>Positive:</b></p> <ul style="list-style-type: none"> <li>• Made spouse feel like she is back in home country</li> <li>• Could speak English</li> <li>• Provided stability</li> <li>• Felt more adjusted</li> <li>• Made friends</li> <li>• Opportunity to be sociable</li> <li>• Do activities together for example visit museums</li> <li>• Served as a support system</li> <li>• Provided comfort to spouse</li> </ul> <p><b>Negative:</b></p>

	<ul style="list-style-type: none"> <li>• Negative tone of conversation</li> <li>• Felt depressed after interaction</li> <li>• All the husbands worked together</li> <li>• Small expatriate community</li> </ul>
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## 4.6 DISCUSSION OF RESEARCH FINDINGS

### 4.6.1 Personal Identity

#### 4.6.1.1 Change in roles

Previous researchers noted that with the dramatic increase in the number of dual career couples being asked to take expatriate positions, changes in employment status and possible sacrifices of professional careers on the part of spouses were likely to become important identity issues (Harvey, 1997:629; Caligiuri, *et al.*, 1998: 560). People who are employed derive part of their identity through their employment-related interactions with others. In a similar way, for people who have made a large investment in professional education and training, or who have been with an organisation for a long period of time, the amount of their identity relating to membership in their profession or work organisation can be significant.

Expatriate spouses whose employment relationships are interrupted for some time or completely put on hold thus lose an important aspect of their identity. Spouses who have worked hard at building a career and are used to making a significant contribution to the family income may feel uncertain about who they have become in their new role as the spouse of an expatriate. The loss of an important role in one's life can create wide-ranging negative affect, reduced self-esteem, and increased psychological withdrawal (Schlenker & Gutek, 1987:287), all of which can be expected to negatively impact adjustment to the expatriate experience. Spouses who do not experience a change in employment status because they are able to work at the same or a similar job may be better able to maintain their identity in a new environment.

The findings of the study correlate with literature findings as stated above. The change in roles that these expatriate spouses experienced had a significant impact on their emotional well-being. A role change that affected four of the five participants was the

change in employment. The spouses felt guilty because they were unable to make a contribution towards the household, they missed the intellectual stimulation work provided them as well as the interaction with colleagues. Some of these spouses also felt they might lag behind in their specific careers once entering back into the job market. Changing from being a career woman to a housewife also had an impact on the spouses' psychological well-being. The spouses experienced a loss of their self-worth, decrease in their sense of accomplishment and purpose in life.

#### 4.6.1.2 Change in thoughts, feelings and behaviour

The spouses also experienced changes in the way they thought and felt about themselves as well as changes in how they behaved since arriving in the host country. The spouses experienced an increase in frustration and anger which resulted in a decrease in the level of patience with their children. These spouses also felt they did not have control over their lives as they had when they were in their home country. The changes in the manner in which the spouses thought, felt and behaved were unfamiliar to them and resulted in them experiencing stress as well as becoming increasingly uncertain of their identities.

As previously stated in Chapter 2, Burke's (1991:836) identity disruption theory, which is based on an integration of the stress and identity literatures, disruptions in the identity process occur when individuals enter new cultures or adopt noteworthy new roles. In such situations, a person's perceived meanings are often incongruent with his or her identity standard: the set of meanings or roles that define who one is. Such incongruence between an individual's identity standard and the inputs received from the environment, result in distress. Reducing this distress requires changing one's thoughts, feelings and behaviours. The spouses in this study were able to change their thoughts, feelings, behaviour and self-talk in order to reduce distress which they were experiencing in the host country. They were able to think more positively about their expatriate experience, feel more confident about themselves and change their behaviour in order to suit their new environment. Being able to make these positive changes helped the spouses to form new identities or modify existing identities which was necessary to have a positive cross-cultural adjustment experience.

#### 4.6.1.3 Change in self-talk

A number of spouses became aware of their self-talk for the first time in the host country. In the home country, the spouses were in a comfort zone and had external motivation from friends, family and peers. When they arrived in the host country, the external motivation was taken away and they had to rely solely on internal motivation. That is when spouses became aware of their self-talk for the first time. Spouses came to the realisation that they needed to change their negative self-talk to positive self-talk in order to assist them in coping with the adjustment to the host country.

#### **4.6.2 Situational Identity**

Harvey (1985:84) found that spouses often became frustrated and felt helpless as they tried to hire and supervise household help, find out where to buy food and household necessities and locate churches, doctors and electricians without understanding the language or the culture. These feelings experienced by spouses were exacerbated if they occurred in tandem with major interruptions, or loss of their career. Just as the spouses in Harvey's (1985) study experienced a variety of feelings so did the spouses in the current study. The spouses taking part in this study experienced a range of cross-cultural adjustment difference. One of the spouses mentioned that she felt like she lived in a bubble and she could not extend herself to do new things as it was too challenging and she was too scared. For another spouse, the cultural differences between the host and home country were difficult to overcome because of the differences between her religion and that of the host country. She also mentioned that the difference in eating habits of the host country had implications for her and her family's diet. These differences between the host and the home country were experienced on a daily basis by the spouses which influenced them on an emotional and psychological level and in return influenced their adjustment.

An individual's self-concept stems not only from within, but also from interactions with others and from interactions with other elements of the external environment (Ogden, 1995:410). Shaffer and Harrison (2001:239) identified three situational sources that have potential influences on the spouses' identity formation process. Two of these, namely cultural novelty and favourability of living conditions, are quite salient in a foreign environment and have been related to spouse adjustment, as well as

expatriate adjustment, in past research (Black & Gregersen, 1991:461; Shaffer & Harrison, 1998:91).

#### 4.6.2.1 Differences between home and host country

Similar to the spouses in Shaffer and Harrison's (2001:242) study, the spouses in the current study experienced that the big difference in cultural novelty between the home and the host country had a negative effect on the cross-cultural adjustment experience of the spouses. All of the spouses experienced the language barrier as the most difficult adjustment.

#### 4.6.2.2 Duration of assignment

The spouses in the current study said they knew from the beginning that there was going to be a lot of uncertainty about the duration of the assignment. Knowing about the uncertainty of the assignment duration aided with the adjustment processes of the spouses because they knew that living in the host country was not permanent and they had to make the most of their experience. Knowing that the assignment could end any day also influenced the spouses negatively as some of the spouses were not concerned with making friends and learning the language. This, in turn, had a negative influence on the spouses' adjustment because they did not fully submerge themselves in the new culture and instead lived a very sheltered life.

In their research, Shaffer and Harrison (2001:240) identified a third situational factor that influenced adjustment as certainty of assignment duration. This was identified as critical by most of the spouses interviewed by them. Spouses preferred (and some explicitly requested) a fixed assignment duration to establish some role clarity or to feel some control over their situation. Although the spouses in the current study preferred fixed assignment duration, they knew the company could not commit to a return date upfront. Although the spouses knew about the uncertainty and could prepare themselves accordingly, they still experienced a significant amount of loss of control, an increase in uncertainty and self-doubt as is evident in the research findings of personal identity.

#### 4.6.2.3 Standard of living

All of the spouses were satisfied with their living conditions in the host country. Living conditions refers to how well one's current accommodations match the living standards to which one is accustomed to. For one spouse, the opportunity to have a house with a pool was an added bonus. The standard of living improved for all of the spouses and aided with the adjustment of the spouses to the host country. According to research done by Shaffer and Harrison (2001:240), the greater the disparity between cultures and the less favourable the living conditions, the more difficult the required adjustment.

#### 4.6.2.4 Company support

Black and Gregerson (1991:465) encouraged firms to continue providing cultural training for spouses as well as pre-assignment visits. The findings of the current study pertaining to company support correlate with the findings in literature. Companies play a vital role in the adjustment of spouses. The spouse in this study found the support of the companies extremely valuable. The company provided the spouses and their families to go on pre-assignment visits and this helped the spouses to prepare themselves for the host country. Once the family arrived in the host country, the company provided language lessons and monetary benefits to the spouse that contributed to a smoother adjustment experience for the spouses.

#### 4.6.2.5 Pre-departure training

The spouses felt that the pre-departure training was helpful in that it prepared them for the expatriation. The training took place over three full days. At the pre-departure training, the spouses and their husbands learnt about the country, culture and the language. Spouses agreed that the cultural training provided them with increased confidence as a result of the knowledge they gained about the country they were moving to. Furthermore, the cultural training provided them with invaluable background needed for a more effective adjustment. These spouses who attended the cultural training were of the opinion that it helped them with their adjustment to the host country. Although the cultural training aided their adjustment in that it provided a lot of information about the country and its culture, spouses were of the opinion that nothing can really prepare a person for Italy, or more specifically, Rome. It is something that you have to experience for yourself.

### **4.6.3 Social Identity**

Within a Social Identity Theory framework (Tajfel & Turner, 1985:12), social identities refer to those aspects of the self-concept stemming from membership in particular groups. These identities are formed and sustained by a network of interpersonal relationships. Shaffer and Harrison (2001:243) identified two major subcategories of social networks or interpersonal relationships from their interviews with expatriate spouses namely family and a host country network of friends and acquaintances. In the first subcategory, the feeling that one could count on support from extended family members was mentioned as an important source of spouse adjustment. Pierce, Sarason and Sarason (1991:1028) found that such perceptions facilitated psychological well-being. They may be especially important to the expatriate spouse who is likely to be separated from face-to-face contact with many extended family members while on assignment, and who typically has no work-related support resources.

#### **4.6.3.1 Relationship between mother and child**

The spouses in the current study were greatly affected by the social adjustments they experienced while living in the host country. The spouses' social identity changed within every sphere of her life. Not only did the spouse's relationship with herself change, but the spouses also experienced changes within the social relationships of people around them. One area where the spouses experienced change was in the relationship with their children and husbands. As mothers, they were more involved with their children's lives now compared to their previous involvement. They were greatly concerned with their children's schooling and experienced more open channels of communication with their children. Although the mothers did not work they still experienced heightened stress levels because of the unfamiliar environment they found themselves in and the new roles they had to fulfil. This resulted in the mothers not being as patient with their children as they wanted to be. According to research by Shaffer and Harrison (2001:238), spouses with school-age children indicated that their children provided some stability in social expectations and served as a vehicle for forming relationships with others. Spouses who had a positive international experience all had parental responsibilities. Research by Mohr and Klein (2004:1189) acknowledged that children's educational and social needs provided a conduit for

social interaction; however, they also introduced stress. These findings are congruent with the findings of the current study.

#### 4.6.3.2 Relationship between husband and wife

Likely the most important influences in a spouse's social environment emanate from the immediate family, including the spouse's partner – the expatriate – and any accompanying children (Caligiuri, *et al.*, 1998:601). As a couple, the expatriate and spouse may share experiences and go through similar psychological reactions. For instance, they will likely find each other to be the main source of conversation and communication. The relationships between husband and wife were influenced by the expatriate experience. It placed the marriage under severe pressure and all of the couples experienced an increase in conflict. Another factor that placed the marriage under pressure was the loss of their support systems. The spouses did not have friends, family member or the church they could turn to for support.

#### 4.6.3.3 Support of family members

Although all of the expatriates were supported by their families to go on a foreign assignment, it still made it difficult for them to go through with the decision. Some of the spouses felt guilty because they were taking the children away from their grandparents and the children were going to miss out on having a relationship with their grandparents. The spouses were all convinced that if they did not have the support of their families it would influence their adjustment in a negative way. Having the support of their families aided their adjustment to the host country.

#### 4.6.3.4 Interaction with host country nationals

Four of the five spouses said that they interacted with host country nationals. The spouses met the host country nationals at the different schools their children attended. The spouses were of the opinion that having children made it easier for them to meet host country nationals. The depth of these relationships between the expatriate spouse and the host country national differed with each spouse. This experience of interacting with host country nationals contributed to the adjustment of the spouses. It made the spouse feel that the community was accepting of her and her family and prevented them from feeling alienated and lonely. Host country nationals offered to help some of the spouses with a variety of different activities and as a result

contributed to spouses feeling more adjusted. In a similar way, Shaffer and Harrison (2010:244) reported that spouses who formed personal relationships with host country nationals reported a better understanding of the host culture. Interactions with host country nationals build an appreciation of and sensitivity to cultural differences and it therefore seems likely that deeper relationships with host country nationals would also facilitate adjustment.

#### 4.6.3.5 Interaction with expat community

Respondents of the Shaffer and Harrison study (2001:240) also joined ready-made organisations and created informal groups of their own. Empirical results indicated that the size, breadth and depth of the social networks were positively related to adjustment. Spouses in the current study also experienced that socialising with other expatriate spouses aided their adjustment process. They could rely on each other for support and did a variety of activities together as a group. The fact that they could speak English to each other and talk about their day-to-day lives made them forget that they were in a foreign country and improved the emotional well-being of the spouses. All of the spouses felt that socialising and being part of the expatriate community aided them with their adjustment process. It helped knowing that they were not the only ones going through a difficult time and that the other spouses experienced the same challenges and feelings.

The cardinal role that the spouse plays in an expatriate assignment was highlighted in Chapter 2. Companies should as a result support spouses' right from the beginning of the expatriate process. A way in which companies could support spouses is through spousal assistance programs. Spousal assistance programs include assessment of the spouse in the selection phase, provision of language and cultural training, pre-assignment visits to the host country and support groups to help the spouse adjust, as well as monetary benefits to assist the spouse in finding productive activities that she can do in the host country (Punnet, 1997:243). The results from the current study correlate with the findings of Punnet's study. The spouses who took part in the current study were supported by the companies that sent them. These spouses received pre-departure training, language lessons and monetary funds. After going for cultural training, the spouses were more knowledgeable about the host country which increased their self-confidence. Although they benefitted from going for cultural

training, they were of the opinion that nothing could really prepare a person for what they might find in the host country. The spouses were of the opinion that the support that they received from the company assisted with their adjustment process.

#### **4.7 CHAPTER SUMMARY**

In this chapter the research findings of the study were discussed. The findings in this study correlate with the findings of previous researchers. Two findings that were prominent in the current research but not in existing literature were the positive effects expatriation has on a spouse and the physical symptoms that spouses experienced in the host country.

Spouses that took part in this study shared their very personal expatriate experiences. This meant sharing such things as changes in their health that they experienced while on the expatriate assignment. These symptoms were not experienced in the home country, therefore it could be inferred that because the stress of the expatriation and adjustment to the host country these spouses experienced physical symptoms like insomnia and weight loss.

A spouse will experience embarking on an expatriate assignment as a challenge at first, but with time she will have the opportunity to master those challenges and turn them into positives. The spouses that took part in the current study had been in the host country between 8 and 11 months. During this period they experienced negative as well as positive aspects of expatriation. Most of the spouses were able to turn some of the negative aspects into positives. Being able to do this was something the spouses could be proud of. It built their confidence, stretched them out of their comfort zones and gave them the opportunity to rediscover themselves like they have never done before. This contributed to the spouses having a pleasant cross-cultural adjustment process.

## **CHAPTER 5: ADJUSTMENT RECOMMENDATIONS**

### **5.1 INTRODUCTION**

The goal of this chapter is to make spouses aware of certain aspects they can implement in their lives, before going on an expatriate assignment, in order to experience a pleasant cross-cultural adjustment process. In this chapter, the information that was received from the participants in the current study will be used to inform possible expatriate spouses of the expected experience they might have in the host country. Most importantly, this chapter will empower spouses with recommendations of how to deal with certain situations during the expatriation and adjustment process. Raising awareness among expatriate spouses of what they might possibly experience is of cardinal importance. Spouses should prevent themselves from entering into a situation of which they have limited knowledge. If spouses prepare themselves accordingly for the expatriate assignment, they will experience a smoother cross-cultural adjustment process.

### **5.2 PERSONAL IDENTITY**

#### **5.2.1 Change in Roles**

Prior to embarking on an expatriate assignment, spouses should give thought to what their possible roles might be once relocated to the host country. Spouses should ask themselves how these roles differ from the roles they fulfil in the home country. If there are drastic role changes taking place between the home and the host country, spouses should spend time thinking about how these role changes might affect them. Spouses should write down what role changes they might experience. Spouses should also think about what a typical day in the host country might look like and compare that with a typical day in their life in the home country. Once relocated, the spouse should consider partaking in activities that she can do during the day to keep her busy, for example, cooking classes. Thinking about and writing down what role changes spouses possibly could experience, will familiarise spouses with the extent of change that they will have to face when they arrive in the host country.

### **5.2.2 Change in Employment**

Before going on an assignment the spouse should enquire about whether or not she will be allowed to work in the host country. If a spouse is not allowed to work, she should ask herself the following questions:

- What am I going to spend my time on in the host country?
- Will it affect my career if I don't work for a number of years?
- Will it affect me if I don't earn a salary?
- Will I miss the interaction with my colleagues?
- Will I miss the intellectual stimulation that work provided me?

By answering these questions truthfully, spouses will become aware of possible adjustments they might encounter pertaining to their career when they arrive in the host country.

### **5.2.3 Change in Thoughts about Self**

Spouses should be prepared to experience changes in the way they think about themselves. Spouses should be aware of negative thoughts and the influence negative thought patterns might have on them. They should try to replace negative thoughts with positive thoughts and practice focusing on the positive aspects rather than on the negative aspects of their cross-cultural adjustment. Spouses should guard against their negative thoughts as they can spiral out of control and influence the spouse's adjustment in a negative way.

### **5.2.4 Change in Feelings about Self**

When going on an expatriate assignment, spouses can expect a change in the way they feel about themselves. The spouse will find herself in a new environment where she will have to make a new life for herself. The spouse should give herself time to adjust to the host country and allow herself to go through the U-curve of adjustment (Figure 2.2). There is no specific time frame in which adjustment must take place. It is each spouse's individual journey. Spouses should try not to compare themselves with other spouses but rather focus on their own journey. Writing in a journal would be beneficial to spouses as it would help them to process what they are feeling. Journaling

is also a way of venting pent up feelings which could alleviate a spouse of negative feelings.

### **5.2.5 Changes in Behaviour**

Experiencing a change in behaviour is natural when a person arrives in a new environment. Spouses arriving in the host country should try and experience as much as possible of the new country. Spouses should not live a sheltered life but rather engage in opportunities the host country has to offer. This could be a fearful experience at first, but if the spouse is successful in extending herself, her confidence will improve immensely. Spouses should start with small challenges and then gradually move on to more challenging ones.

### **5.2.6 Change in Self-Talk**

The impact that self-talk has on a person should never be underestimated. The same is true for a spouse when going on an expatriate assignment. The spouse's self-talk needs to be of a positive nature if she wants to have a positive adjustment experience. The spouse will be confronted with many new and challenging situations in the host country. She first needs to master these challenging situations in her mind before she will be able to master them in real life. Positive self-talk can be seen as essential in order to motivate the spouse when she feels overwhelmed in the host country. A spouse should identify certain mantras that she can repeat to herself on a regular basis in order to facilitate a positive self-talk.

## **5.3 SITUATIONAL IDENTITY**

### **5.3.1 Differences between Home and Host Country**

#### **5.3.1.1 Language:**

If a language difference exists between the host and the home country, spouses should attempt to learn the basics of the host country language prior to relocation. Once relocated, spouses should continue with the endeavour of mastering the host language. Learning the language will help the spouse to feel more adequate in the host country as she will be able to function normally by communicating and reading as she did in the home country.

### 5.3.1.2 Culture

Spouses should seek to familiarise themselves with the culture of the country they are expatriating to. If there are certain aspects about the new culture they are unsure of, they should pursue those aspects by reading up on them and finding ways to gain understanding of the cultural differences. If a spouse is unsure of possible locations where she will be able to find certain specific food products she could research it on the internet or ask other spouses for possible replacements.

### 5.3.1.2 Assignment duration

Whether or not the assignment duration is known, the spouse should still make the most of her experience in the host country. A spouse should not let the assignment duration influence her adjustment. A spouse should, where possible, continue with her life in the host country just as she lived her life in the home country. A spouse should guard against having a negative attitude of 'just waiting for the day to go home' and therefore living with her suitcase packed and ready for departure. The new house should become a home where the spouse and her family can continue with their lives.

### 5.3.1.3 Standard of living

In order to have a pleasant adjustment process, spouses should try to maintain the same standard of living in the host country as they had in the home country. This might not always be possible and it might not always be up to the spouse to decide what their standard of living is going to be like. Companies sending expatriates should therefore take note that if there is a big difference in standard of living between the home and the host country of the expatriates, they might experience difficulty with the adjustment process.

### 5.3.1.4 Company support

The support companies provide to expatriates plays a cardinal role in the adjustment process of the expatriate and his spouse. Companies should support expatriates at the commencement of the expatriate process and expatriates should feel that they always have the support of their company especially in the host country. Companies should support expatriates by:

- Sending families on a pre-assignment venture to visit the host country in order to find a house to live in and a school for the children;
- Providing the family with pre-departure training before leaving on the assignment;
- Providing the family with a contact person to assist them once they arrive in the host country;
- Providing the family with a comprehensive medical aid scheme;
- Providing language lessons for the spouse;
- Providing the spouse with the information regarding available psychologists if they should have the need to see one; and
- Providing spouses with monetary funds.

## **5.4 SOCIAL IDENTITY**

### **5.4.1 Relationship with Children**

The spouse could expect to spend more time with her children in the host country than she did when residing in her home country because of the loss her support system. Spouses should therefore approach the expatriate assignment as a wonderful opportunity to deepen the relationship with their children. As most spouses will be unemployed in the host country, it also provides mothers with the opportunity to see their children grow up, an opportunity they might not have had if they were still living in the home country. Having children in the host country can be seen as an advantage. Children serve as a wonderful vehicle through which spouses can get to know other mothers be it from school or at a birthday party.

### **5.4.2 Relationship with Husband**

There is a possibility that spouses might experience an increase in conflict with their husbands when arriving in the host country. Before going on the assignment, couples should try and have certain measures in place that are beneficial for their marriage, for example going out for a meal together once a month. Having these measures in place will make it easier for them to continue with them once they arrive in the host country.

### **5.4.3 Family Support**

Knowing that your family supports you with the decision of going on an expatriate assignment can aid with the adjustment process. Knowing that they have their family's support assists the spouses to continue with the assignment especially during difficult adjustment periods. If an expatriate does not have the support of his family and he is finding it difficult to adjust, it might be easier to terminate the expatriation assignment and return to the home country.

### **5.4.4 Host Country Nationals**

When the spouse arrives in the host country it is extremely important that she becomes friends with host country nationals. The host country nationals can assist the spouse with a variety of tasks that she might find challenging. By spending time with host country nationals, the spouse will have an enriched experience by learning about the culture, heritage and local customs of the host country. The host country nationals can help the spouse feel more accepted by the community and therefore aid with her adjustment.

### **5.4.5 Other Expatriate Spouses**

Spending time with other expatriate spouses can be beneficial for the spouse. Spouses could serve as a support group for each other. Knowing that one is not going through the expatriate assignment alone and that there are other spouses that experience the same feelings and thoughts could bring comfort to the spouse. The spouses can do different activities together and can help spouse to deal with feelings like loneliness and frustration.

## **5.5 CHAPTER SUMMARY**

In Chapter 5, recommendations were given to potential expatriate spouses that might assist them in their adjustment during the expatriation process. The goal of this chapter was to create awareness among spouses of situations, emotions and challenges they might experience when they arrive in the host country. Being aware of what spouses might experience during the expatriation process will help the spouse with her preparation. If the spouse is well prepared prior to expatriating, it will contribute to her having a pleasant adjustment experience. Spouses should remember that going on

an expatriate assignment will affect each person differently and that it is not a one-size-fits-all scenario. As we are all individuals, each spouse will have her own journey. The next chapter provides a summary of the research and the conclusions that have been drawn from the study.

## **CHAPTER 6: FINDINGS AND RECOMMENDATIONS**

### **6.1 INTRODUCTION**

This chapter examines the findings emanating from the study conducted as described in Chapter 4 of this research. The methodology for this study was discussed in detail in Chapter 3 and a literature study relevant to the topic was presented in Chapter 2.

The steps that were followed in this research process involved choosing a research question, selecting a research approach and drafting a specific research design, as well as describing, analysing, interpreting and presenting the research data (Bordens & Abbot, 2011:500). In this chapter, themes are linked with one another, conclusions are drawn and recommendations are made.

The concluding step in this research process is to inform the readers what was done and found (Bordens & Abbot 2011:500). Reporting the research results is deemed the most important step because it is only by this reporting that research is advanced. Readers and other researchers working in the therapeutic field need to know what has been done in terms of the questions that were posed, the methods that were used to address them, and the answers that were found. This step is not only essential for progress, but also required to assess the reliability of the research findings and the soundness of the conclusions. Only when research has been reported, can contemporaries attempt to replicate and extend the findings and further expand the body of knowledge.

### **6.2 PURPOSE OF THIS RESEARCH**

The main purpose of this research study is to answer the research question which is as follows:

What are the cross-cultural adjustments expatriate spouses' experience in a host country?

### **6.3 CONCLUSIONS WITH REGARD TO LITERATURE REVIEW**

In Chapter 2, a thorough literature review was done in order to establish existing knowledge pertaining to expatriate spouses. More specifically, the aim of the literature

review was to research the specific experiences expatriate spouses go through as well as how these experiences influence the spouses' cross-cultural adjustment. Figure 6.1 provides an overview of the scope of the research.

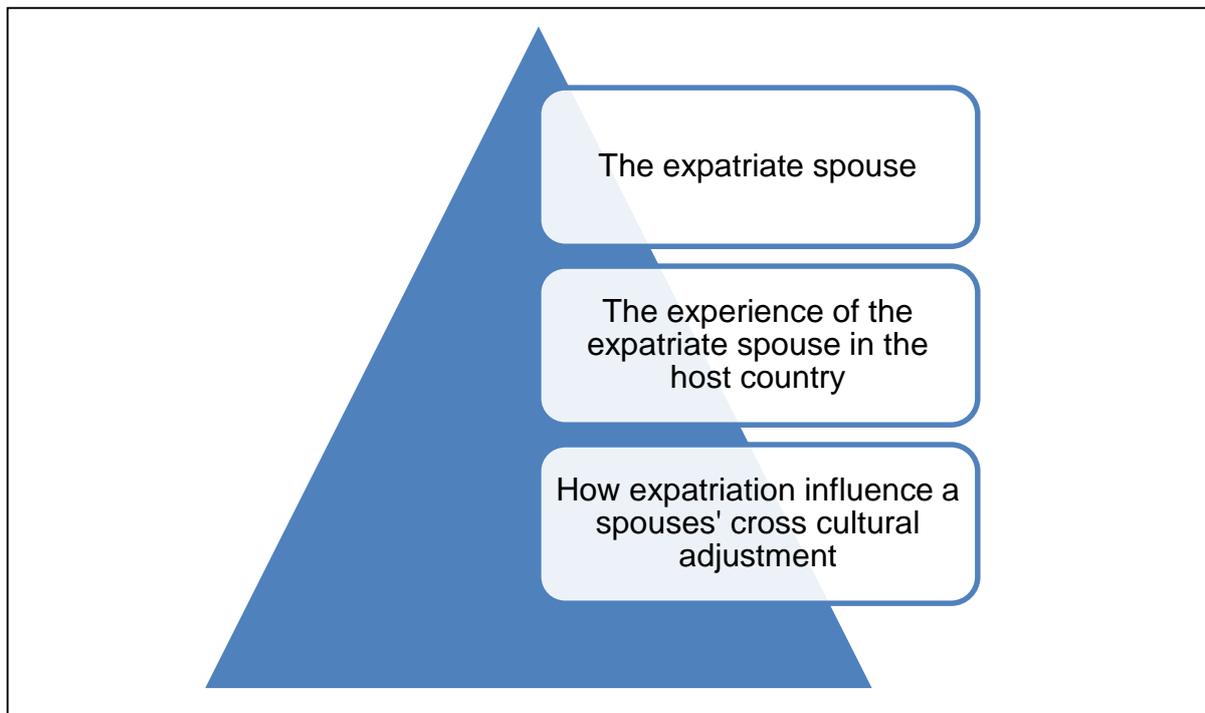


Figure 6.1 Literature review of expatriate spouse

Previous research on expatriation was done from a human resource perspective and neglected to take the expatriate spouse into consideration. Only when companies noticed that the number of failed expatriate assignments was increasing did they start to investigate the causes for these high failure rates. What researchers noticed was that a number of assignments fail because of the inability of the expatriate spouse to adjust to the host country. The inability of the spouse to adjust influences the expatriate in such a way that he is not able to do his work effectively and the assignment inadvertently results in a failure. It was evident in the existing research that the experience of the expatriate spouse varied significantly from the experiences of the expatriate. The expatriate spouse is faced with a number of cross-cultural adjustments once she arrives in the host country. In order for the spouse to adjust successfully to the host country the spouse has to make certain changes to her normal way of life compared to the home country.

According to research a large contributing factor of spousal adjustment to the host country is the spouse's identity. When a spouse arrives in the host country, she will experience a loss in many different areas of her life because of the new environment. In order for the spouse to adjust successfully to the host country, the spouse will have to undergo a process of identity reformation. If the spouse forms a new identity, it will reduce the ambivalent feelings that she might be experiencing and assist with her adjustment process.

#### **6.4 CONCLUSIONS FROM THE EMPIRICAL RESEARCH**

In this study, five expatriate spouses who were residing in Rome, Italy, were used as participants. A qualitative research approach was deemed adequate and suitable as a research method for this specific study. The research included personal interviews with each participant as well as one focus group session after all individual interviews were completed. The research method proved to be successful to gain an in-depth understanding of the cross-cultural adjustment experiences of expatriate spouses, specifically from the spouses' perspective. Questions that were asked to participants were categorised under three main headings which included personal, situational and social identity. Responses received from spouses were given in Chapter 4. These responses correlate with the literature review done in Chapter 2.

All of the spouses had undergone a variety of experiences since arriving in the host country. Some of the experiences of spouses were positive while others were negative. Accordingly some of the experiences aided with the adjustment of the spouses to the host country while other experiences influenced their cross-cultural adjustment negatively. The spouses were of the opinion that they had to make certain changes concerning their identities in order to adjust to the host country. Figure 6.2 below provides an overview of the process of adjustment in terms of the theoretical foundations of the study.

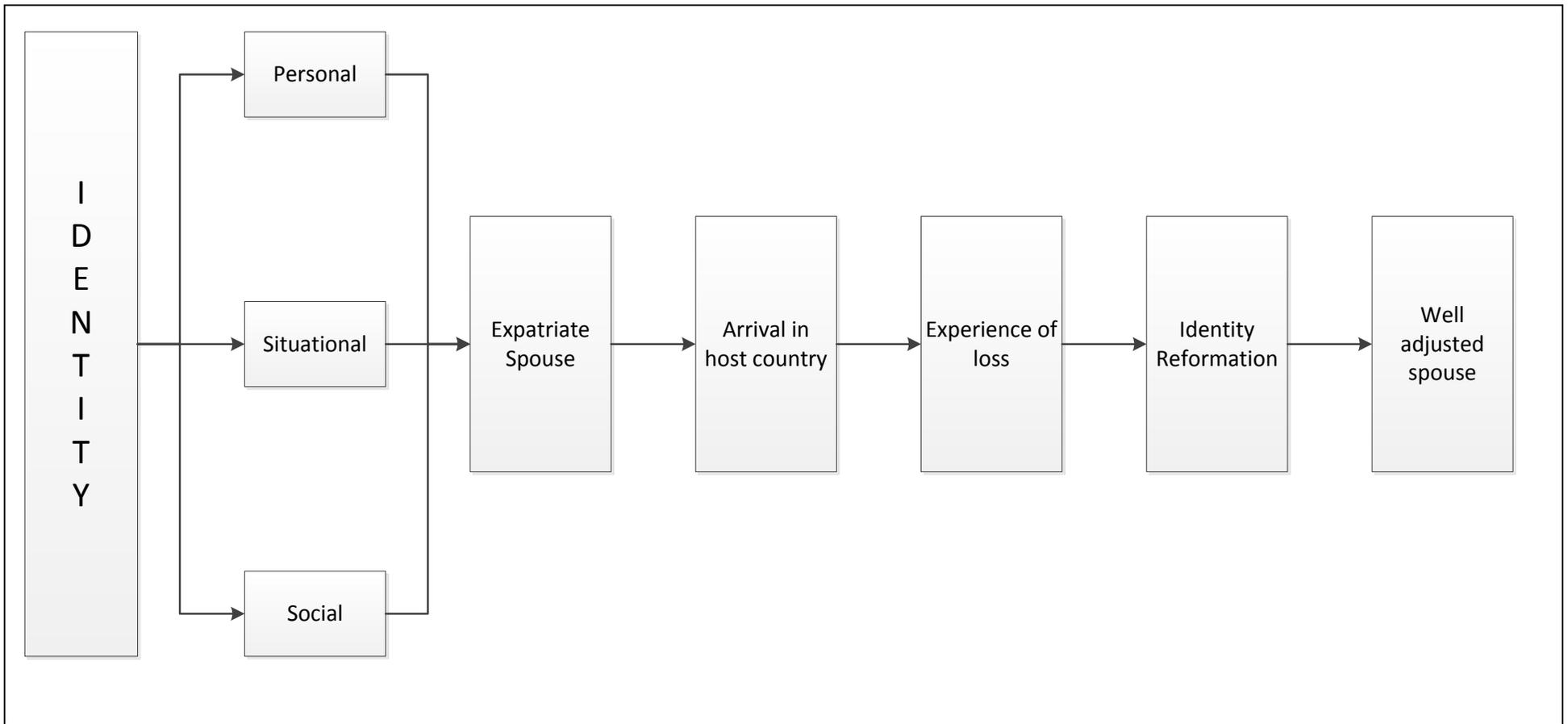


Figure 6.2 Integration of research findings

## 6.5 LIMITATIONS OF THIS RESEARCH STUDY

- This study was done on a group of spouses who all expatriated to Rome, Italy. Because the spouses expatriated to the same country it possibly resulted in the spouses having similar experiences. Their answers therefore are also more or less similar specifically pertaining to the situational identity. If this study were to be repeated in another country, for example, India, different answers might be obtained. This study is therefore not representative of what other spouses experience in different countries but is restricted to what spouses in Rome experienced. Spouses expatriating to other countries might experience that different factors play a role in their adjustment.
- Only female spouses took part in this research study. It is a well-known fact that there is an emerging trend of male spouses who are accompanying their wives on expatriate assignments. These spouses may experience similar or different adjustments than female spouses.
- This research study made use of a small number of participants. Although this study was set out to be a qualitative study, it could have been to the benefit of the study to include a larger number of participants in the study. By only using five spouses as sources of research, this research study may not have explored the full spectrum of what spouses might experience.
- The participants in this study were only representative of two different countries. The spouses were from South Africa and from England. In order to determine whether the experiences of these spouses are representative of different cultures, researchers should include spouse that are from diverse cultural back grounds. As seen in this study, spouses' cultural origin influenced the way that they experienced their adjustment.
- This study did not take personality factors into account. Individuals with a higher level of agreeableness, extraversion and openness to change and a lower level of neuroticism might be better able to cope with the stress associated with such situations. A similar relationship may also exist with other personality variables

such as extraversion, conscientiousness and agreeableness (Cheng & Furnham, 2002: 327).

## **6.6 CONTRIBUTIONS**

This qualitative research study was successful in that it contributed to the body of knowledge about expatriate spouses as it shed new light on the experiences of expatriate spouses but specifically from the spouse's perspective. As well as documenting the personal experiences of spouses, this study also indicated how cross-cultural adjustments influenced the spouses' identity on a personal, situational and social level. By reading this research study, potential expatriate spouses, expatriates and companies sending expatriates on assignments would come to a better understanding of what expatriation for the spouse entails. This research would hopefully better prepare the spouse for the experiences that she might encounter. The research done in this study will also guide the expatriate and companies in how they can support the spouse in order to have a successful cross-cultural adjustment process.

## **6.7 RECOMMENDATIONS FOR FUTURE RESEARCH**

The following recommendations should be considered by researchers who wish to do research on the cross-cultural adjustment experiences of spouses:

- Heterogeneous group  
Studies should consider doing research on spouses that are expatriating to different countries in order to get a better understanding of the expatriate experiences of spouses.
- Male spouses  
Researchers should include male spouses when doing research as these male spouses can give valuable insight into the adjustment experiences of spouses. Researcher should therefore not only limit their research to the experiences of female spouses.

- Larger sample

A larger research sample of participants should be used. By including more participants in the study, the researcher might gain a better understanding of the experiences of expatriate spouses. These experiences could then be generalised to other expatriate spouses.

- Cultural diversity

Researchers should include spouses that are from different countries; the research would therefore be more representative of how spouses from different cultural origins experience adjustment.

- Personality factors.

It can be expected that personality would play a big role in how expatriate spouses experience cross-cultural adjustment. Researchers should consider taking these factors into consideration.

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## APPENDIX A: RESEARCH CLEARANCE



### Research Ethics Clearance Certificate

This is to certify that the application for ethical clearance submitted by

**B Muller [45768013]**

for a M Ed study entitled

**A psycho-educational analysis of the cross-cultural adjustment experiences of  
expatriate spouses**

has met the ethical requirements as specified by the University of South Africa  
College of Education Research Ethics Committee. This certificate is valid for two  
years from the date of issue.



Prof KP Dzvimbho  
Executive Dean : CEDU



Dr M Claassens  
CEDU REC (Chairperson)  
[mcdtc@netactive.co.za](mailto:mcdtc@netactive.co.za)

Reference number: 2014 JUNE /45768013/MC

19 JUNE 2014

## **APPENDIX B: LETTER OF INFORMED CONSENT**

### **A PSYCHO-EDUCATIONAL ANALYSIS OF THE CROSS-CULTURAL ADJUSTMENT EXPERIENCES OF EXPATRIATE SPOUSES**

My name is Bernice Muller. I am conducting research for the purpose of completing my Master of Education degree with Specialisation in Guidance and Counselling at the University of South Africa.

I am asking you whether you will allow me to conduct one interview with you. If you agree, I will ask you to participate in one interview for approximately one hour. I am also asking you to give us permission to tape record the interview. I will tape record the interviews so that I can accurately record what is said.

Please understand that your participation is voluntary and you are not being forced to take part in this study. The choice of whether to participate or not, is yours alone. If you choose not take part, you will not be affected in any way whatsoever. If you agree to participate, you may stop participating in the research at any time and tell me that you don't want to go continue. If you do this there will also be no penalties and you will NOT be prejudiced in ANY way.

Any study records that identify you will be kept confidential to the extent possible by law. The records from your participation may be reviewed by people responsible for making sure that research is done properly, including my academic supervisor/s. (All of these people are required to keep your identity confidential.)

All study records will be destroyed after the completion and marking of my thesis. I will refer to you by a code number or pseudonym (another name) in the thesis and any further publication.

This study will be extremely helpful to us in understanding the cross-cultural adjustment experiences of expatriate spouses. If you would like to receive feedback on the study, I can send you the results of the study once it has been completed.

This research has been approved by the UNISA Ethics Clearance Committee. If you have any complaints about ethical aspects of the research or feel that you have been harmed in any way by participating in this study, please contact my supervisor, Prof H E Roets at UNISA.

**CONSENT**

I hereby agree to participate in research on the cross-cultural adjustment experiences of expatriate spouses. I understand that I am participating freely and without being forced in any way to do so. I also understand that I can stop participating at any point should I not want to continue and that this decision will not in any way affect me negatively.

I understand that this is a research project whose purpose is not necessarily to benefit me personally in the immediate or short term.

I understand that my participation will remain confidential.

.....

**Signature of participant**                      **Date:**.....

I hereby agree to the tape-recording of my participation in the study.

.....

**Signature of participant**                      **Date:**.....

## **APPENDIX C: INTERVIEW GUIDE**

### **Questions to be asked during interview:**

#### **Background information:**

How long have you been living in Rome?

What is your home country?

Do you have any children? How old are they?

Please tell me about your expatriate experience?

What are the adjustments that you had to make?

How do you think has these adjustments influenced you?

How do you think has these adjustments influenced the people around you?

#### **Situational Identity:**

Is there a big difference between the host country and the home country concerning cultural novelty?

How long is your husband's assignment for?

How are you experiencing your living conditions?

Would you say you are having the same standard of living in the host country than you had in your home country?

#### **Social Identity:**

How do you think has the expatriation influenced your relationship with your husband/children?

Do you have support from family members?

Do you interact or know some of the host country national?

Do you interact or know some of the expat community?

Do you get support from your husband's company?

Did you receive any pre-departure training?

#### **Personal Identity:**

Has there been a change in your roles that you fulfil as a person?

Were you employed in your home country? Are you employed now?

Does this change in employment affect you?

Has there been a change in the way that you think about things?

Has there been a change in the way that you do things?

Has there been a change in the way that you feel about things?

Has there been a change in the way that you talk to yourself?

Has there been a change in the way that you think about yourself?

#### **APPENDIX D: FOCUS GROUP QUESTIONS**

What were your adjustment experiences since moving to the host country?

How has these adjustments influenced your life personally?

How has these adjustments influenced your life socially?