

**THE EFFECTS OF INTERNATIONAL RELOCATION ON EXPATRIATE PARTNERS'  
SUBJECTIVE WELL-BEING**

by

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## DECLARATION

January 2015

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I, Athena Elizabeth van Renen, declare that **The effects of international relocation on expatriate partners' subjective well-being** is my own work, and that all the sources that I have used or have quoted from have been indicated and acknowledged by means of complete references.



SIGNATURE

12 January 2015

DATE

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## **ABSTRACT**

The purpose of this research was to investigate the relationship between the cross-cultural adjustment of the expatriate spouse and their level of subjective well-being. Demographic factors were considered to identify life domains that may affect cross-cultural adjustment and subjective well-being respectively. The Spousal Adjustment Scale, Scale of Positive and Negative Experience, Satisfaction with life scale, and Flourishing scale were used in the study. A quantitative, cross-sectional survey design was used, and a purposive sample which consisted of expatriate spouses currently residing in Germany was approached (N=156). Descriptive and inferential statistical analyses were applied.

The results yielded a statistically significant correlation between cross-cultural adjustment and subjective well-being of expatriate spouses and indicated statistically significant differences between demographic groups including language proficiency, dependents, time spent in host country, nationality, career sacrifice, and support network.

It was concluded that there is a positive relationship between the cross-cultural adjustment of the expatriate spouse and their well-being and that various demographic factors can influence both constructs.

## **KEY WORDS**

Cross-cultural adjustment, subjective well-being, expatriate spouse, psychological adjustment, demographic, expatriation, self-determination theory, discrepancy theories, need satisfaction, psychological needs, work adjustment, interaction adjustment, general adjustment, culture shock, social support, life satisfaction, positive affect, negative affect

## **CHAPTER 1. SCIENTIFIC ORIENTATION TO THE RESEARCH**

This dissertation investigates the effects of expatriate relocation on the subjective well-being and cross-cultural adjustment of the expatriate spouse or partner. Chapter 1 contains the background of the study alluding to the motivation for the research. The paradigms underpinning and models forming the definitive boundary of the study are mentioned and briefly discussed. The research process including the methodology; choice of psychometric instruments; data analysis techniques and considerations; and ethical consideration in support of the study has been discussed. Chapter 1 concludes with a summary of the chapter.

### **1.1 BACKGROUND AND MOTIVATION**

The context of the study is international human resource management, with specific focus on expatriation and the success and failure of international assignments. As globalisation continues, international assignments are increasingly used as a means by which information sharing, knowledge transfers and organisational routine transmissions can be undertaken (Purgat-Popiela, 2011). As a result, the use and deployment of expatriates will continue to expand into the 21<sup>st</sup> Century (Kraimer, Wayne & Jaworski, 2001; van Aswegen, 2009; van der Bank & Rothmann, 2006; 2002; van Erp, Giebels, van der Zee & van Duijn, 2010; van Erp, Giebels, van der Zee & van Duijn 2011; Vogel, van Vuuren & Millard, 2008). Expatriates typically spend between six months and five years in an international location, usually with the intention to return 'home', with a specific motive and purpose for being in that specific location (De Cieri, Dowling, & Taylor, 1991). For many companies in South Africa and worldwide, sending expatriates abroad to develop global competencies is usually consistent with their overall strategic Human Resource plan (van der Bank & Rothmann, 2006).

Successful expatriate assignments are indispensable to multinational companies for both developmental and functional reasons (Takeuchi, Yun & Tesluk, 2002; van der Bank & Rothmann, 2006). Most midsized and large companies (80%) send a number of their employees abroad, with nearly half of these companies planning to increase the number of international assignees (Purgat-Popiela, 2011). The scale of international assignment failure still remains significant as it reaches 25-40% of the total expatriation level in developed countries and about 70% in developing countries (Purgat-Popiela, 2011). The two most frequently cited reasons for the failure of international assignments is expatriate problems with cross-cultural adjustment and expatriate spouse problems

with cross-cultural adjustment in a host country (Ali, Van der Zee & Sanders, 2003; Black & Stephens, 1989; Caligiuri, Hyland, Joshi & Bross, 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; Shaffer & Harrison, 1998; van der Bank & Rothmann, 2002; 2006; van Erp et al., 2010; Vogel et al., 2008). In the context of this study, adjustment is defined as 'the process of changes experienced by an individual and its outcomes emerging as a result of moving to a foreign country' (Purgat-Popiela, 2011; van Erp et al., 2010). A plethora of research exists on the cross-cultural adjustment of expatriate's on international assignments, but limited studies have been conducted focusing on the cross-cultural adjustment of the accompanying spouse (van Erp et al., 2011).

Previous studies have shown that the expatriate spouse or partner's cross-cultural adjustment has a positive and significant effect on the expatriate's cross-cultural adjustment, which in turn may also affect the performance of the expatriate and their intention to terminate the international assignment prematurely (Ali et al., 2003; Black, 1990; Black, Mendenhall & Oddou, 1991; Parker & McEvoy, 1993; Purgat-Popiela, 2011; Shaffer & Harrison, 1998; van der Bank & Rothmann, 2006). The majority of the expatriates (80%) around the world are married and more than 60% of expatriate spouses accompany them on their assignments, making this relationship a primary concern for investigation for organisations making use of expatriate assignments (Ali et al., 2003).

In most cases, spouses don't have a formal support network in the host country and are more fully immersed in the new culture through daily domestic responsibilities (De Cieri, Dowling, & Taylor, 1991; Jones-Corley, 2002; Martens & Grant, 2008). They may also struggle with issues of self-esteem and identity as their careers are often put on hold so that they can accompany their partner on the international assignment (Martens & Grant, 2008). The expatriate, expatriate spouse and children (when applicable), go through a process of cross-cultural adjustment categorised into two interconnected dimensions, namely psychological adjustment and socio-cultural adjustment (Ali et al., 2003; Caligiuri et al., 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; Shaffer & Harrison, 1998, Takeuchi et al., 2002; van Aswegen, 2009; van der Bank & Rothmann, 2006; Vogel & van Vuuren, 2008).

Psychological adjustment is described as the subjective well-being or mental states felt by an individual in a new environment (De Cieri et al., 1991). For the expatriate spouse, psychological adjustment starts before leaving their home country and continues throughout the assignment in the host country, and lasts at least a few weeks after returning (De Cieri et al., 1991). Therefore, the subjective well-being of the expatriate spouse is an important consideration when approaching

adjustment and can be defined as people's evaluations of their lives – evaluations that are both affective and cognitive (Diener, 2000; Sell & Nagpal, 1992).

Socio-cultural adjustment is the ability to adjust to interactions in the host country (i.e. the difficulty of dealing with everyday life) (Kraimer et al., 2001; Purgat-Popiela, 2011). The socio-cultural adjustment issues can be further divided into a three dimensional model proposed by Black, Mendenhall and Oddou (1991) consisting of work adjustment, interaction adjustment, and general adjustment (Kraimer et al., 2001; Purgat-Popiela, 2011). A study conducted by Shaffer and Harrison (1998), confirmed a positive relationship between the spouse's adjustment and the expatriate's adjustment in each of the three domains. The bidirectional nature of this relationship between expatriate adjustment and spouse adjustment is called the crossover effect (Purgat-Popiela, 2011). The crossover effect is the influence of an individual on another with respect to a particular variable, in this case, cross-cultural adjustment (Takeuchi et al., 2002). A 'spill over' effect occurs when the different adjustment domains interact, for example, job satisfaction (work adjustment) and general adjustment (Erdogan, Bauer, Truxillo & Mansfield, 2012; Purgat-Popiela, 2011; Takeuchi et al., 2002).

According to Black et al. (1991), the three dimensions of adjustment are influenced by various factors categorised into individual factors and work-related factors, of which spousal adjustment was originally categorised as a non-work factor, but later studies and empirical research exhibited the spouse or partner's adjustment as a separate and crucial factor, positively influencing all expatriate's adaptation dimensions (Purgat-Popiela, 2011). Therefore, Shaffer and Harrison (1998) proposed that along with general and interaction adjustment, a personal category should be introduced, linked to the sense of 'being at home' and depending on the extent to which a spouse can re-establish his/her social identity.

In conclusion, as important as it is to study the cross-cultural adjustment of expatriates on foreign assignments and the effect of this adjustment on success and failure, the literature shows that one of the most frequently cited reasons for failure is the maladjustment of the expatriate (trailing) spouse, making this an equally important topic to investigate (Ali, Van der Zee & Sanders, 2003; Black & Stephens, 1989; Caligiuri, Hyland, Joshi & Bross, 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; Shaffer & Harrison, 1998; van der Bank & Rothmann, 2002; 2006; van Erp et al., 2010; Vogel et al., 2008). There is a paucity of empirical studies based on and confirming the effects of expatriation on the expatriate spouse, and what variables influence the adjustment of the spouse,

making it imperative for further investigation, especially with the number of expatriate assignments increasing with growing globalisation.

## **1.2 PROBLEM STATEMENT**

Various researchers have conducted empirical studies in an attempt to understand what antecedents influence the premature turnover of expatriates on international assignments. Numerous global studies have been conducted to also ascertain the relationship between cross-cultural adjustment and expatriate turnover intention (Martens & Grant, 2008; van Erp, Giebels, van der Zee, & van Duijn, 2011). Common findings have noted that expatriates' premature turnover intention and difficulty in adjusting to the host country is often related to the expatriate spouse or partner and family's issues with adjusting to the host country. Life satisfaction has also been shown to be related to lower turnover (Erdogan et al., 2012).

Essentially there is a paucity of research studies conducted in the global context on the effects of expatriation on the expatriate spouse, and the individual variables that influence that cross-cultural adjustment such as subjective well-being and various demographic factors. In this regard, research about these variables could make a valuable contribution to organisations in understanding the reason why expatriates terminate their assignments prematurely, in the global context.

The study therefore aims to benefit not only the industrial and organisational psychologists and human resource practitioners, but also multinational corporations who invest in international assignments. The study attempts to facilitate understanding regarding why expatriate spouses have difficulty adjusting to the host country, therefore most likely influencing the expatriate's subjective well-being, and ultimately, their premature turnover intention. It was anticipated that the findings from this study could inform future organisational interventions for expatriate assignments, specifically in terms of the inclusion of the expatriate spouses/partners in the preparation, training and support before, during and after the assignment.

Following from the background and problem identified, the following research hypotheses were posed and were tested empirically in this research:

H1: Spouses/Partners' adjustment, specifically interaction and general adjustment, will be positively related to their subjective well-being.

H01: Spouses/Partners' adjustment, specifically interaction and general adjustment, will not be positively related to their subjective well-being.

H2: Various demographic factors influence the expatriate spouse/partner's ability to adjust.

H02: Various demographic factors will have no influence on the expatriate spouse/partner's ability to adjust.

H3: Spouses/partners' subjective well-being level will influence their turnover intention.

H03: Spouses/Partners' subjective well-being level will have no influence on their turnover intention.

In view of the above mentioned problem and hypotheses, this research was designed to answer the following literature and empirical questions:

**Research questions with regard to the literature review:**

- How is cross-cultural adjustment conceptualised in the literature?
- How is subjective well-being conceptualised in the literature?
- Is there a theoretical relationship between the level of cross-cultural adjustment and subjective well-being?
- Do other factors such as previous overseas experience and other demographic factors influence cross-cultural adjustment of expatriate spouses?

**Research with regards to the empirical study:**

- What is the nature of the empirical relationship between cross-cultural adjustment and subjective well-being as manifested in a sample of respondents currently residing in Germany?
- Does subjective well-being predict positive cross-cultural adjustment?
- What recommendation and areas for future research based on the research findings can be proposed for the field of Industrial and Organisational Psychology with regards to expatriate spouses/partners?
- What recommendations can be made to the organisation with regards to informing preparation, training and support practices?

### **1.3 AIMS OF THE RESEARCH**

The background to the study highlights that adjusted spouses can serve as valuable assets to international assignments, particularly functioning as a source of support for the expatriate (Selmer, 2001). This in turn, may also facilitate the expatriate's job performance. In relation to the empirical research questions as stated above, the following aims were formulated:

#### 1.3.1 General aim of the study

The primary aim of the study was to explore the relationship between subjective well-being and cross-cultural adjustment, and how the two constructs influence each other. Although many researchers have considered adjustment and subjective well-being as synonymous, for the purposes of this study, adjustment and subjective well-being will be explored as two distinct but conceptually linked constructs. The secondary aim of the study was to incorporate primary aims with specific references to people with different demographic characteristics, for example gender, age, nationality, and previous overseas experience, and whether they differed significantly regarding these variables.

#### 1.3.2 Specific aims of the research

The following aims were formulated for the literature review and empirical study

##### *1.3.2.1 Literature review*

The review of literature aimed to:

- Conceptualise cross-cultural adjustment from a theoretical perspective
- Conceptualise subjective well-being from a theoretical perspective

- Explain the theoretical relationship between cross-cultural adjustment and subjective well-being with reference to expatriate spouses/partners.

### *1.3.2.2 Empirical study*

The empirical study aimed to:

- Explore the empirical relationship between cross-cultural adjustment and subjective well-being as manifested in a sample of respondents currently residing in Germany;
- Determine whether subjective well-being predicts positive cross-cultural adjustment;
- Ascertain whether different demographic groups differ significantly with regard to cross-cultural adjustment and subjective well-being;
- Highlight areas for further/future research based on the research findings for the field of Industrial and Organisational Psychology with regards to expatriate spouses/partners; and
- Propose recommendations for organisations with regard to informing preparation, training and support practices.

## **1.4 THE PARADIGM PERSPECTIVE**

Paradigms are defined as comprehensive systems of interlocking practice and thinking that define the nature of research along the dimensions of ontology, epistemology and the methodology (Terre Blanche, Durrheim, & Painter, 2006). Ontology specifies the nature of reality that is to be studied and what can be known about it; Epistemology specifies the nature of the relationship between the researcher (knower) and what can be known; and Methodology specifies how researchers may go about practically studying whatever they believe can be known (Terre Blanche et al., 2006). Essentially the paradigm is a lens through which the researcher views the obvious and not so obvious principles of reality (Terre Blanche et al., 2006). The paradigm perspective in this study refers to the meta-theoretical values and beliefs underpinning the theories and models that informed the study.

#### 1.4.1 Intellectual climate

The literature review of cross-cultural adjustment and subjective well-being is presented from the positive psychology and open systems paradigm.

Positive psychology is an 'umbrella' term for the study of positive emotions, positive character traits, and enabling institutions (Seligman, Steen, Park & Peterson, 2005b). It is a relatively young field of psychology and draws from the works of Rogers, Maslow, Erickson, Vaillant, Jahoda, Goldstein, among many others, and enhances our understanding of how, why, and under what conditions positive emotions, positive character, and the institutions that enable them, flourish (Seligman et al., 2005b). In formulating the conceptual framework for positive psychology, Martin E. Seligman (2008, p. 7) took the scientifically unwieldy notion of "happiness" and broke it down into several more quantifiable aspects: positive emotion (the pleasant life), engagement (the engaged life), and purpose (the meaningful life).

The positive psychology paradigm was relevant for this study as the focus is on the influences of subjective well-being, a variable of positive psychology's positive emotion, on the cross-cultural adjustment of expatriate spouses/partners and their intention to stay in the host country.

The systems theory approach focuses on the parts and processes that interact in a dynamic way (Caligiuri et al., 1998). A 'system' may be described as a complex of interacting components together with the relationships among them that permit the identification of a boundary-maintaining entity or process (Laszlo & Krippner, 1998). This theory advocates that an organism's behaviour cannot be solely understood as a function of parts, but rather how these parts influence each other. The behaviour that is observed is the output of the whole organism. The individual co-exists in relation to an environment. Through continuous interaction with the environment, the individual will develop a sense of fit in the environment (Caligiuri et al., 1998).

The family systems theory was relevant for this study as a means to understand the interactions between the expatriate spouse or partner and the environment as a part of a larger family system and how these interactions effected their cross-cultural adjustment and even their level of subjective well-being.

The empirical review was presented from a positivist research paradigm. The positivist approach adopts a more objective and detached epistemology, compared to an interpretive or constructionist approach, viewing the external reality as stable, predictable and law-like (Sharp, McDonald, Sim,

Knamiller, Sefton & Wong, 2011; Terre Blanche et al., 2006). The positivistic methodology is experimental and quantitative and includes hypothesis testing, ensuring validity, reliability and replication is achieved before generalisations are made (Sharp et al., 2011; Terre Blanche et al., 2006). The study was grounded in this paradigm to ensure an objective and scientific analysis of the empirical evidence.

#### 1.4.2 Meta-theoretical statements

Meta-theoretical statements are philosophies or schools of thought that reflect the nature of the discipline and give the research questions within a framework (Babbie & Mouton, 2009). It encourages the integration of theory and sets parameters for prediction by specific theories and within certain contexts (Abrams & Hogg, 2004). In the empirical context the study was based on models and theory in relation to the variables identified. In the disciplinary context the research focused on industrial and organisational psychology as a field of application. The following meta-theoretical statements were relevant to the study:

##### *1.4.2.1 Industrial and Organisational Psychology*

According to Schreuder and Coetzee (2010), Industrial and Organisational Psychology is the scientific study of people within the work context, through the application of psychological principles, theory and research. Its objectives are to increase knowledge and understanding of human work behaviour through research initiatives and applying the knowledge acquired through research to improve work behaviour, the work environment and psychological conditions of the workers. Industrial and organisational psychologists are both scientists and practitioners (Schreuder & Coetzee, 2010).

The study of expatriate premature turnover is one of the work-related attitudes which IO psychology assesses. Essentially, the study of the relationship between the expatriate spouse or partner's cross-cultural adjustment and subjective well-being, may contribute to existing and new knowledge that may improve the success rate of expatriate assignments.

#### *1.4.2.2 Personnel Psychology*

Personnel psychology is the field of psychology closest related to and overlapping human resource management. It is the scientific study of individual differences in the workplace, and includes job analysis and criterion development; psychological assessment, employee selection and placement; employee reward and remuneration; employee training and development; career development support; employee performance evaluation; attracting and retaining scarce and critical talent; and encouraging adherence to employment related legislation (Schreuder & Coetzee, 2010).

The study looks at the differences in age, gender, previous international experience, children, employment status, social networks and language proficiency in relation to the expatriate spouse or partner's cross-cultural adjustment, and subjective well-being.

#### *1.4.2.3 Theoretical Models*

The literature review of cross-cultural adjustment is presented from Black and Stephens' (1989) three dimensional model of cross-cultural adjustment and De Cieri, Dowling and Taylor's (1991) phases of psychological adjustment. Subjective well-being is primarily presented from Deci and Ryan's (1985) self-determination theory of Subjective Well-Being and Wilson's (1967) multiple discrepancy theory of satisfaction.

#### *1.4.2.4 Conceptual descriptions*

A brief description of the variables is detailed below:

1. Cross-cultural adjustment – in the context of this study, adjustment is described as “the degree of psychological comfort with various aspects of a new setting” (Black & Gregersen, 1991, p. 498).
2. Subjective Well-being – refers to people's subjective evaluations of their lives. These evaluations are both affective and cognitive (Diener, 2000).

### 1.4.3 Central hypothesis

The central hypothesis of the study was formulated as follows:

*Spouses/Partners' cross-cultural adjustment, more specifically, interaction and general adjustment, is positively related to their subjective well-being.*

## 1.5 RESEARCH DESIGN

A research design is a strategic framework for action that serves as a bridge between research questions and the execution or implementation of the research (Terre Blanche et al., 2006). The main research paradigms in social sciences are the positivist, interpretive and constructionist approaches (Terre Blanche et al., 2006.) The positivist approach adopts a more objective and detached epistemology, compared to an interpretive or constructionist approach, viewing the external reality as stable, predictable and law-like (Terre Blanche et al., 2006; Sharp, McDonald, Sim, Knamiller, Sefton & Wong, 2011). The positivistic methodology is experimental and quantitative and includes hypothesis testing, ensuring validity, reliability and replication is achieved before generalisations are made (Terre Blanche et al., 2006; Sharp et al., 2011).

For the purpose of this study a cross-sectional survey design targeting expatriate spouses/partners stationed in Germany was used, with the main aim of describing the empirical relationship between the variables (Rindfleisch, Ganesan & Moorman, 2008). Surveys were used to prompt information from the respondents about their beliefs, opinions, characteristics and past or present behaviour (Rindfleisch et al., 2008; Terre Blanche et al., 2006).

### 1.5.1 Research variables

According to Terre Blanche et al. (2006), research variables can be defined as concepts that can take on two or more values. Variables are measured so that scores indicate the amount of an attribute a unit has. An independent variable is the hypothesised causal variable and the variable

that the experimenter manipulates to determine its effects on the dependent variable, whose value depends on the value of the independent variable (Terre Blanche et al., 2006). In this study the independent variable is the level of cross-cultural adjustment, and the dependent variable is subjective well-being. The study focuses on establishing whether there is a significant statistical relationship between these variables.

### 1.5.2 Methods used to ensure reliability and validity

Considerations for validity and reliability of the study are imperative in conducting scientific research. Great care must be taken to ensure a valid and reliable research process. Therefore, measures were put in place to ensure a valid and reliable research process:

#### *1.5.2.1 Validity*

In its broadest sense validity refers to the degree to which the research conclusions are sound (Terre Blanche et al., 2006). In terms of the measuring instruments used in the study, validity is defined as the degree to which a measure does what it is intended to do, or more specifically, it means that the measure should provide a good degree of fit between the conceptual and operational definitions of the construct, and that the instrument should be usable for the particular purposes for which it was designed (Terre Blanche et al., 2006). It is important for the study to have both internal and external validity so that causal conclusions can be drawn and generalisations can be made from the data and context of the research study to the broader populations and settings, respectively (Terre Blanche et al., 2006). In this study, validity was ensured by:

- Using models and theories relevant to the research topic, aim and problem statement, as guidelines for the research.
- Selecting measuring instruments that are applicable to the models and theories informing the study and that are presented in a standardised manner.

Selection of a representative sample was done in order to ensure external validity. Identification of plausible rivalry hypotheses and eliminating their impact will be done to achieve design validity (Terre Blanche et al., 2006).

Data was collected, stored and analysed electronically. To ensure protection and authenticity of data, a password, only known by the survey administrator was used to access the data.

#### 1.5.2.2 Reliability

Reliability is the degree to which the results are repeatable (Terre Blanche et al., 2006). This applies to both the participant scores on measures and to the outcomes of the study as a whole. The reliability of the measuring instruments refers to the dependability of a measurement instrument; that is, the extent to which the instrument yields the same results on repeated trials (Terre Blanche et al., 2006). In terms of the research process reliability was ensured as follows:

- *Data collection* – Only expatriate spouses/partners currently based in Germany were invited to participate in the study;
- *Data Management* – all data collected was stored electronically by the survey administrator. Access to this information was restricted to the administrator by the use of a code;
- *Data analysis* – a statistical package (SPSS) was used to analyse the data to ensure reliability in analysis. Cronbach Alpha coefficients were used to establish internal consistency and resultant reliability of the instruments used to collect data. According to Terre Blanche et al. (2006), a reliability coefficient of between 0.70 and 0.75 is adequate for research instruments.

#### 1.5.3 Unit of study

The unit of analysis refers to the objects or things that are the object of a research study (Terre Blanche et al., 2006). There are four different units of analysis that are common in the social sciences: individuals, groups, organisations, and social artefacts (Terre Blanche et al., 2006). For this study, sub-groups were the unit of analysis for the biographical variables, and individuals were the unit of analysis for the study itself, focusing on cross-cultural adjustment and subjective well-being. The analysis was generalised to the group.

#### 1.5.4 Methods to ensure ethical research principles

The ethical guidelines stipulated by the department of Industrial and Organisational Psychology and the Health Professions Councils of South Africa (HPCSA), formed the bases of the study. Ethical clearance to conduct the study was applied for through the Research Committee of the department of Industrial and Organisational Psychology. Informed consent was obtained from the participants and all data and results were handled confidentially. In ensuring confidentiality the participants were asked not to indicate their names or write any information that may compromise their identity. The results obtained was communicated to the participants from which the data was collected and the dissertation supervisor and the recommendations made were for the benefit of organisations who make use of expatriate assignments as strategic human resource imperatives. No harm was done to the participants during the study (Terre Blanche, et al., 2006).

### 1.6 RESEARCH METHOD

The study consisted of two phases. The first phase was the literature review and the second phase consisted of the empirical study. Figure 1 gives a diagrammatic presentation of the research method.

#### **Phase one: Literature review**

The following was proposed in this phase:

Step 1: Conceptualise cross-cultural adjustment from a theoretical perspective

Step 2: Conceptualise subjective well-being from a theoretical perspective

Step 3: Integrate the variables and conceptualise the theoretical relationship between the variables

Step 4: Formulate the study hypotheses in order to achieve the study objectives.

#### **Phase two: Empirical study**

Phase two consisted of the following steps:

Step 1: Determination and description of the sample

The population comprised of expatriate spouses/partners currently based in Germany. Nonprobability sampling, specifically purposive sampling was used to determine the sample size of 156 expatriate spouses/partners. The defining characteristics of the sample size were that they are expatriate spouses/partners who are residing in Germany for 6 months to 5 years, depending on the length of the international assignment. The sample consisted of spouses/partners of expatriates based in various parts of the host country (Germany). Identified participants were emailed the questionnaire, via a link, where they then had to complete and upload the survey.

### Step 2: Choosing and motivating the measuring instrument

The assessment was divided into the following parts

Part A – biographical data regarding age, gender, time on current assignment, accompanying dependents, status of employment in host country, language proficiency, country of origin, existence of support networks, employment status in home country, and previous overseas experience

Part B – questions relating to spousal cross-cultural adjustment

Part C – questions relating to subjective well-being

Part D – questions relating to the intent to stay

The instruments that will be used to measure the variables are:

#### *1. Spousal adjustment scale*

The Spousal Adjustment Scale (Black & Stephens, 1989) was developed from the widely used expatriate adjustment scale, and is a commonly used measuring instrument of expatriate spousal adjustment. Spousal adjustment is comprised of two factors, namely interaction adjustment (3 items) and general adjustment (6 items). Items are measured on a 7-point Likert scale ranging from 1 (Completely unadjusted) to 7 (Completely adjusted). Essentially, the Spousal Adjustment Scale measures the extent to which an expatriate spouse or partner has adjusted to their new environment (host country). The general adjustment sub-scale measures the extent to which the spouse has adjusted to the culture, surroundings and novelty of the host country and the interaction adjustment sub-scale measures the extent to which the spouse has adjusted to interacting with the nationals in the host country. Black and Stephens (1989) reported the scale for spouse general adjustment has a reliability of .86, and the scale for the spouse interaction adjustment scales has a reliability of .95.

This is indicative that the instrument is reliable in measuring the construct of spousal/partner adjustment.

## 2. *Subjective well-being scales*

Subjective well-being (Diener, Wirtz, Tov, Kim-Prieto, Choi, Oishi & Biswas-Diener, 2010; Pavot & Diener, 1993) will be measured using three sub-scales, namely the Scale of Positive and Negative Experience (SPANE), the Satisfaction with Life Scale (SWLS), and the Flourishing Scale (FS).

- *Scale of Positive and Negative Experience (SPANE)*

The Scale of Positive and Negative Experience (SPANE) is designed to assess subjective feelings of well-being and ill-being (Diener et al., 2010). This 12-item questionnaire includes six items to assess positive feelings and six items to assess negative feelings. For both the positive and negative items, three of the items are general and three per subscale are more specific (Diener et al., 2010). Each SPANE item is scored on a 5-point Likert scale ranging from 1 (very rarely or never) to 5 (very often or always). The positive and negative scales are scored separately because of the partial independence of the two types of feelings. Diener et al. (2010) reported a .89 Cronbach alpha for the scale as a whole, and .87 for the positive items, and .81 for the negative items. This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being.

- *Satisfaction with Life Scale (SWLS)*

The Satisfaction with Life Scale (SWLS), measures the cognitive component of subjective well-being (Erdogan et al., 2012; Lyubomirsky, Dickerhoof, Boehm & Sheldon, 2011; Pavot & Diener, 1993). The SWLS items are global rather than specific in nature, allowing respondents to weight domains of their lives in terms of their own values, in arriving at a global judgement of life satisfaction (Erdogan et al., 2012; Pavot & Diener, 1993). The scale consists of 5 items measured on a 7-point Likert scale, ranging from 1 (Strongly Disagree) to 7 (Strongly Agree). The scale has been validated in countries including Brazil, the Netherlands, Russia, and China, among others (Erdogan et al., 2012). SWLS shows more stability than one's mood and it also has convergence with peer and family evaluations of life satisfaction (Erdogan et al., 2012). Pavot and Diener (1993) examined the SWLS for both reliability and sensitivity and results showed a strong internal reliability and moderate temporal stability. The reported coefficient alpha of the scale is .87 (Lyubomirsky et al., 2011). This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being.

- *Flourishing Scale (FS)*

The Flourishing Scale (FS) is designed to measure social-psychological prosperity, describing important aspects of human functioning ranging from positive relationships, to feelings of competence, to having meaning and purpose in life, to complement existing measures of subjective well-being (Diener et al., 2010). The FS consists of 8 items measured on a 7-point Likert scale ranging from 1 (Strongly Disagree) to 7 (Strongly Agree). All items are phrased in a positive direction. Diener et al. (2010) reported a .87 Cronbach alpha for the Flourishing Scale. This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being.

### Step 3: Data administration

#### *Data collection*

The questionnaire was uploaded on a survey service provider and participants were invited to voluntarily respond to the questionnaire.

#### *Data management and storage*

The data collected was stored electronically by the survey administrator. Data was protected and accessed via a code known by the survey administrator, thereby ensuring authenticity and security of the data.

#### *Data analysis*

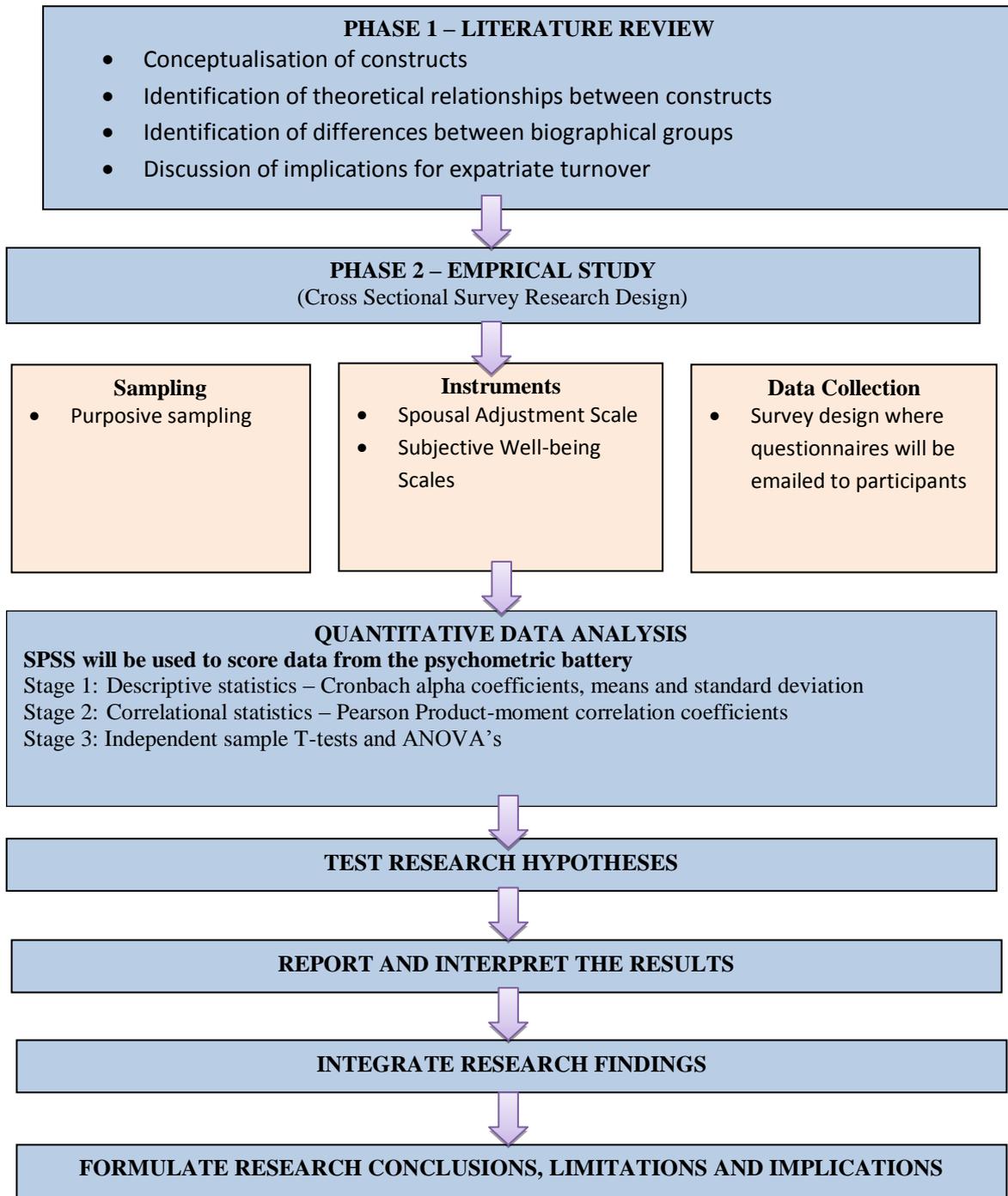
A quantitative research approach was used for this study and the statistical data was processed and analysed by means of descriptive (means and standard deviations), inferential and correlational statistics. The SPSS (Statistical Package for the Social Sciences) programme was used to analyse the data. Cronbach alpha coefficients were used to assess the internal consistency reliability properties of the psychometric instruments. Pearson Product-moment correlation coefficients were calculated to indicate the relationship between variables. Independent sample T-tests and ANOVAS were used to compare group means obtained from different groups on selected biographical variables. The researcher made use of a statistician to conduct the data analysis to ensure accuracy.

#### *Discussion*

Research findings were discussed in relation to the study assumptions and literature. Contradictory findings were highlighted and recommendations for further research were proposed.

Figure 1

Flow chart of Research method (adapted from Babbie & Mouton, 2009)



## **1.7. CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS**

### 1.7.1. Conclusions

The study intended to conclude that there is an empirical relationship between expatriate spouse or partner cross-cultural adjustment and subjective well-being. Furthermore, the study anticipated finding differences between various demographic groups with regards to expatriate spouse or partner cross-cultural adjustment and subjective well-being.

### 1.7.2. Limitations

The following limitations were anticipated:

- Not all participants requested to participate in the study will respond to the questionnaire;
- Some participants may have difficulty in completing the questionnaire as it is web-based and not in the form of paper and pencil (it cannot be assumed that all participants will be equally capable or comfortable using an electronic device).

### 1.7.3. Recommendations

The study hoped to make the following recommendations:

- There is an empirical relationship between the variables in the study with regards to expatriate spouses/partners who show high levels of adjustment and subjective well-being are less likely to have a negative influence on the adjustment of the expatriate, thus making turnover less likely;
- Expatriate spouses/partners from different demographic groups will differ with regards to adjustment and subjective well-being, making this a valuable selection consideration;
- Highlight considerations for IHRM practices; and
- Indicate areas for further research in the field of Industrial and Organisational Psychology with regards to international assignments.

## **1.8. CHAPTER LAYOUT**

The structure of the study, in terms of chapter layout, was as follows:

### **Chapter 1: Scientific orientation to the study**

The aim of this chapter will be to introduce the topic and discuss the variables to be investigated. This chapter will provide guidelines as to what design the study will take and the methodology to be used in collecting and analysing data.

### **Chapter 2: Literature Review**

The aim of this chapter is to provide a conceptual analysis of research variables, namely expatriate spouse/partner cross-cultural adjustment and subjective well-being. The practical implications of the relationship between cross-cultural adjustment and subjective well-being will be discussed.

### **Chapter 3: Research Article**

The structure of this chapter will take the form of a research article. The methodology, data collection and analysis will be presented in this chapter. The measuring instruments and statistical information from the data analysis, pertinent to the study objective and hypotheses will be discussed.

### **Chapter 4: Conclusions, limitations and recommendations**

This will be the final chapter containing an integrated discussion and conclusion of the results. Recommendations for organisations will be presented in this chapter as well. Limitations experienced during the study will be noted and recommendations made for future research and for the field of Industrial and Organisational Psychology.

## **1.9 CHAPTER SUMMARY**

In chapter 1 the scientific orientation to the research was discussed. This contained the background and motivation, the research problem, aims, the paradigm perspective, and the research design and method. The chapter ended with the chapter layout. Please note that for the remainder of the dissertation from this point forth, the expatriate spouses and partners will be referred to synonymously as the expatriate spouse, regardless of marital status.

## **CHAPTER 2. LITERATURE REVIEW**

### **2.1 INTRODUCTION**

In a world where the importance of international business continues to grow, the global platform for expatriate assignments is increasing, with more and more employees being sent abroad to complete international assignments (Brewster, Bonache, Cerdin, & Suutari, 2014). As a result, the amount of research on the topic of expatriation has significantly increased over the last few years. Many expatriate employees have families who are impacted by international assignments as well. Expatriate spouses are often expected to pack up their homes and families and accompany their spouse thousands of kilometres away from their friends and family, for extended periods of time. Furthermore, many of these spouses give up promising careers or jobs to make it possible for them to accompany their spouses abroad. For many of these spouses this is a very frightening and stressful time where they have to adjust to and integrate into a foreign country where the culture differs from their own. On the other hand, for some spouses it is an exciting new experience and they enjoy the transition and incorporation into the new culture. These differences have various antecedents that contribute to the degree to which the spouses adjust however they all still share a common identity: they have left their home country to accompany their spouse on an international assignment.

Multinational corporations regularly send expatriates and their families abroad to their associated companies on assignment where they are subsequently subjected to the inevitable process of cross-cultural adjustment. A plethora of literature exists on the effects of cultural differences on the expatriate employee in terms of adjustment to work, integration, and general aspects of life in a host country, thus confirming the inevitability of the process of cross-cultural adjustment. Therefore, cross-cultural adjustment and the effects thereof are crucial to consider with the ever increasing number of global assignments. To better understand the effects of cross-cultural adjustment on the expatriate family, the term 'expatriate' needs to be clarified. The expatriate is defined as "a sojourner who leaves his or her country under assignment for business purposes with the intent of eventual return" (Williams, 2008, p. 16). For the purpose of this study, the expatriate and the accompanying expatriate spouse must be differentiated from other sojourners such as travellers, refugees, and self-initiated expatriates. Due to the increase in expatriate assignments an important consideration for the multinational corporations is the adjustment of the spouse. Much of the research that has been conducted on the success of expatriate assignments appears to discuss the

development and adjustment of expatriates as though they were isolated individuals without spouses, families or friends (Black & Gregerson, 1991; Palthe, 2004). The degree to which the spouse adjusts successfully to the host country may influence the expatriate's premature turnover intention and the success or failure of the expatriate assignment. Currently the three most common criteria for evaluating expatriate success is completion of the assignment, expatriate cross-cultural adjustment and the expatriate's performance on the foreign assignment (van der Bank, & Rothmann, 2006). With regards to the current study, the influence of the expatriate spouse will be viewed from the premature turnover intention criteria of assignment success. Regardless of whether the expatriate is the male or female partner in the family, spousal support is vital for the satisfaction and overall adjustment of the expatriate family, providing affirmation and comfort during the stressful periods of adjustment (Edstrom & Jervfors, 2007).

Although a paucity of scientific research exists on the experiences and adjustment of the expatriate spouse, existing literature on the expatriate and expatriate adjustment indicates that premature turnover of expatriate assignments is frequently attributed to the maladjustment of the expatriate spouse (Ali, van der Zee, & Sanders, 2003; Black, & Stephens, 1989; Calgiuri, Hyland, Joshi, & Bross, 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; Schaffer, & Harrison, 1998; van der Bank, & Rothmann, 2002; 2006; van Erp et al., 2010; Vogel et al., 2008). Many of these expatriate spouses have to manage the details of the international move with little or no outside help and are usually responsible for settling the children, organising the house and dealing with the bureaucratic aspects of the move, all whilst struggling with their own acculturation and frustrations (Jones-Corley, 2002).

The following subsections will take a closer look at cross-cultural adjustment, its theoretical background, and how it presents within this study, as well as subjective well-being, its theoretical background and how it affects the cross-cultural adjustment of the expatriate spouse.

## **2.2 CROSS-CULTURAL ADJUSTMENT**

In the following section the construct of cross-cultural adjustment will be defined and discussed as a multifaceted construct, clarifying the psychological dimension of cross-cultural adjustment and the phases associated with adjusting to a foreign culture. Finally, the theoretical origin will be briefly reflected upon and the factors that influence cross-cultural adjustment will be identified and discussed.

### 2.2.1 Cross-cultural adjustment defined

Understanding the concept of expatriate spousal cross-cultural adjustment requires cross-cultural adjustment to be investigated and understood as an independent construct. Cross-cultural adjustment can generally be defined as the process of adaptation an individual goes through, living and sometimes working in a foreign culture (Palthe, 2004). Cross-cultural adjustment can further be described as “the degree of psychological comfort with various aspects of a new setting” (Black, & Gregersen, 1991, p. 498). The individual's ability to function effectively in a new culturally different environment provides an indication of the individual's cross-cultural adjustment. It is a complex process in which an individual becomes capable of functioning effectively in a culture other than the one that they were originally socialised in (Haslberger, 2005). Culture can be and is often described as the collective programming of the mind and consists of shared patterns of behaviour which serve as a framework for future behaviour of a group (Williams, 2008). Culture is patterns of thinking that is developed during childhood; a form of ‘programming’ of the mind that begins within the family home, schools, and community (Long, 2010). Each country has a different culture, some differing more or less in comparison to others. Many countries have different cultures within their own borders creating a melting pot of unique patterns and habits colliding and combining with one another. Cultural differences between countries can present themselves in different facets of everyday life, for example, traffic laws, attitudes towards time, dress codes, attitudes toward personal space, noise, gender roles, country laws, shopping hours, religious customs and superstitions (Long, 2010).

### 2.2.2 Cross-cultural adjustment as a multifaceted construct

The process of adjustment is the art or process of modification of physical parts such as location, food and climate, and the relative degree of harmony between the individual's needs and the requirements of the environment (Long, 2010). Earlier studies on adjustment in cross-cultural settings conceptualised cross-cultural adjustment as a one-dimensional construct (Black & Gregerson, 1991; de Pamich, 2006; Palthe, 2004), but more recent conceptualisations identified cross-cultural adjustment as a multifaceted construct (Black et al., 1991). According to Black and Gregersen (1991), cross-cultural adjustment takes place across three different facets. The three facets of cross-cultural adjustment are work adjustment, interaction adjustment and general adjustment (Black et al., 1991; Chang, 1997; Palthe, 2004). In other words adjustment can be measured in terms of adjustment to the general environment, to work situation, and to interaction

with host nationals (Chang, 1997). Different antecedents relate to different facets of adjustment (Black & Gregersen, 1991) therefore it is important to distinguish between these three facets because not all important factors are related equally, or at all, to all three facets (Chang, 1997). Puck, Holtbrügge and Dölling (2003) conducted a review of existing studies on the factors that influence cross-cultural adjustment of expatriates and compiled a table with the information on the correlation types. This table includes the influence of the expatriate spouse on the cross-cultural adjustment facets of the expatriate, treating it as a separate and crucial factor positively influencing all expatriate adaptation dimensions (Purgat-Popiela, 2011). Purgat-Popiela (2011) captured the various factors specifically influencing the adjustment of the expatriate spouse or partner in a similar table to illustrate the specific factors associated with spousal cross-cultural adjustment (Table 1).

Work adjustment involves the adjustment to the new job, its roles and tasks, the new work environment and the responsibilities that are included (Black et al., 1991; Kraimer et al., 2001; Palthe, 2004; Purgat-Popiela, 2011). According to Black, Gregersen and Mendenhall (1992), adjustment to work is the easiest of the three dimensions of adjustment because the job is usually aided by similarities in procedures, policies and requirements of the foreign operation and home-country operation tasks (Chang, 1997). Thus, work adjustment can take place more rapidly if the new work environment and tasks are similar to that of the home country and if the policies and procedures are similar.

The second dimension is interaction adjustment and involves the comfort of the individual in interacting with the host country's nationals in both work and in non-work situations (Black et al., 1991; Kraimer et al., 2001; Palthe, 2004; Purgat-Popiela, 2011). According to Black, Mendenhall and Oddou (1991), this particular dimension of cross-cultural adjustment is the most difficult of the three dimensions to achieve. This could be due to the differences that exist in rules and thought processes of the different cultures. When expatriate spouses interact with the host nationals, differences in perceptions, beliefs, and values emerge (Chang, 1997), which may cause discomfort, uncertainty and or frustration. Each country has its own unique culture that has rules guiding individuals to behave and function properly in their respective societies (Chang, 1997). According to Chang (1997, p. 151) "as a result of all these differences, conflicts and misunderstandings may arise between newcomers entering the foreign culture and the host nationals". This in turn can cause the newcomers, or in this case the expatriate spouses, to experience negative emotions which will most likely hamper cross-cultural adjustment.

The third dimension of cross-cultural adjustment is general adjustment and it involves the overall adaptation to living in a foreign environment and culture (Black et al., 1991; Chang, 1997; Kraimer

Table 1

Factors influencing the adjustment of the expatriate spouse/partner (Purgat-Popiela, 2011)

Factor	Influence on spouse adjustment
<b>Personal</b>	
Change in employment status (employed to unemployed)	No significant influence
Language fluency	Positive influence
Satisfaction with life	Positive influence
Satisfaction with family relationships	Positive influence
Self-esteem	Positive influence
Social support in host country	Positive influence
Extended family support	No significant influence
Having pre-school aged children	Positive influence
Social efficacy	No significant influence
<b>Organisational</b>	
Company assistance	Positive influence, strong in early stages
Certainty of assignment duration	No significant influence
<b>Cultural/environmental</b>	
Culture shock	Negative influence in early stages
Perceive culture distance	Negative influence in early stages
Culture novelty	Negative influence
Favourability of living conditions	Positive influence

et al., 2001; Palthe, 2004; Purgat-Popiela, 2011). Factors influencing daily life are usually categorised into this dimension including living, housing, food, health care, and cost of living (Palthe, 2004).

Cultural similarity or 'cultural distance' (Palthe, 2004) plays an important role in this facet of cross-cultural adjustment as it will influence the expatriate or spouse's perception of how different the host culture is to their own. If there are large differences between the cultures, uncertainty is likely to set in concerning how to behave and how difficult it will be to 'fit in'. This will be elaborated on in following sections.

### 2.2.3 The psychological dimension of cross-cultural adjustment

Cross-cultural adjustment exists in two interconnected dimensions, namely psychological adjustment and socio-cultural adjustment (Ali et al., 2003; Calgiuri et al., 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; Schaffer, & Harrison, 1998; Searle & Ward, 1990; Takeuchi et al., 2002; van Aswegen, 2009; van der Bank, & Rothmann, 2006; Vogel, & van Vuuren, 2008). According to Long (2010), psychological adjustment is described as the person's subjective well-being and the level of acceptance regarding the new environment, and socio-cultural adjustment is described as the ability to blend in with the host culture and is based on cultural learning theory.

Psychological adjustment refers to an individual's change in their psychological characteristics and the surrounding context, in order to achieve a better fit, or greater harmony, between the individual and their environment (De Cieri et al., 1991). The psychological adjustment associated with expatriation and repatriation was dynamically described and developed by De Cieri et al. (1991, p. 377-413), and starts to take place before the expatriate and the spouse leave their own country. The psychological perspective of the adjustment process highlights the emotions experienced at the time of the global assignment, including anxiety, homesickness, satisfaction, frustration and stress (Purgat Popiela, 2011).

Anticipation of the impending expatriation creates expectations and comes with its own set of challenges (e.g. making arrangements for housing, children's education, etc.). This anticipation might cause a specific hedonic reaction even before the event has occurred (Luhmann, Hofmann, Eid & Lucas, 2012). This is where some expatriate spouses anticipate the move as being exciting albeit challenging, and that once they have arrived in the host country, things will start to normalise again. Unfortunately this is a mistaken perception that many expatriate spouses have.

#### 2.2.4 The phases of psychological adjustment to relocation

The initial phase of expatriation is called the 'Honey moon' phase (De Cieri et al., 1991; Purgat-Popiela, 2011), and is usually associated with a time period where the expatriate and expatriate spouse may experience an unrealistically positive appraisal of their new surroundings and experience a sense of novelty (Please refer to Figure 2). The duration of this phase is usually relatively short-lived and starts to wear off as the expatriate and expatriate spouse start to come to terms with the realities of life and challenges in the new environment. This is usually also accompanied by a feeling of 'the party's over' (the second phase), which is loaded with negative appraisals and attitudes towards the host country (De Cieri et al., 1991; Purgat-Popiela, 2011).

Before they start to adjust to the new culture, expatriate spouses often experience 'culture shock'. The Penguin Dictionary of Psychology defines culture shock as "the emotional disruption often experienced by persons when they pay an extended visit to or live for some time in a society that is different from their own" (Reber & Reber, 2001, p. 170). At the most fundamental level, culture shock is brought about by uncertainty (Sims & Schraeder, 2004). Uncertainty can present itself in many areas of expatriate life such as what behaviours are deemed acceptable and unacceptable in the host country, traffic rule differences, the ability to complete simple, everyday tasks in a new language, or even the socially necessary task of making friends.

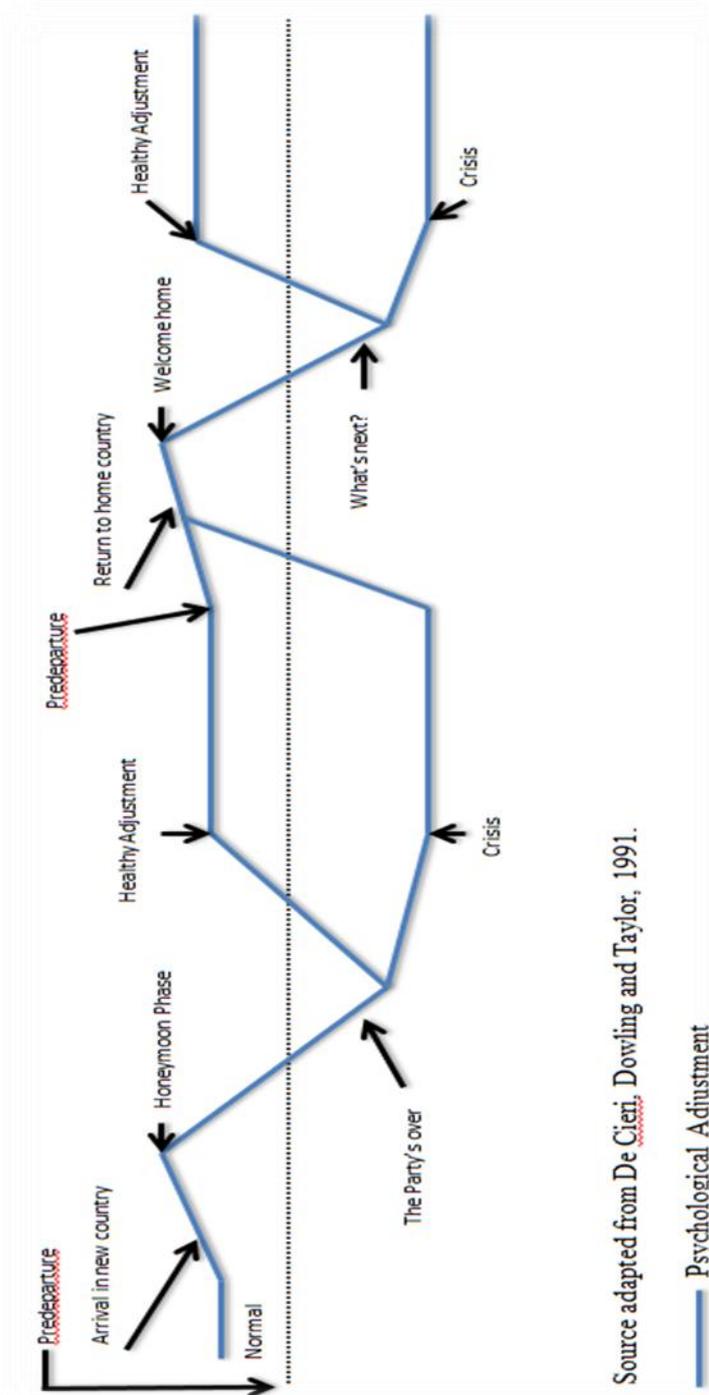
As psychological adjustment continues, and the expatriates and spouses become more aware of the sources of irritation in the host culture, they enter the third phase, namely 'the turning point' (De Cieri et al., 1991). At this point in the adjustment cycle, expatriates and their spouses are beginning to become accustomed to the host culture and its various differences. This phase usually has a more realistic appraisal of the host culture without overly positive or negative perceptions. The fourth phase in psychological adjustment to relocation is 'healthy recovery' (De Cieri et al., 1991). Healthy recovery occurs when the expatriate or expatriate spouse has successfully adjusted psychologically to the host country and has come to terms with the challenges associated with the expatriate assignment and life in the new culture.

In some cases the expatriate or the expatriate spouse may go through a 'crisis' period (De Cieri et al., 1991) rather than transitioning into the healthy recovery phase, where they start to perceive a sense of impossibility to ever adjust to the host country and as a result, become despondent. This is when expatriate assignments are at risk of being prematurely terminated, marriages are put in jeopardy and subjective well-being reaches an all-time low.

The final phase of cross-cultural adjustment according to De Cieri, Dowling and Taylor (1991) is the repatriation of the expatriate spouse back into their home country. Many ignore this very

Figure 2

The phases of psychological adjustment to relocation (Source adapted from De Cieri et al., 1991).



important phase of cross-cultural adjustment assuming that when the expatriate and family have returned to their home country, life will go back to what it was before they left. This is a common misconception. Repatriates may feel like strangers in their own countries where many of their friends and family have not had similar long-term overseas experience, and cannot relate to their experiences and the emotional implications of being back.

According to De Cieri, Dowling and Taylor (1991), the expatriate spouse is too often left to cope alone as the expatriate returns to work, and the spouse goes from 'having lived in the lime-light of the community life and under the magnifying-glass of its members' (p.381) to the dimness of private life where they have no incentive to and no space for displaying the most hard earned qualities. The repatriation process may be very similar to the expatriation process for expatriate spouses. According to De Cieri et al (1991), the pre-repatriation is characterised by the anticipation to return home and once the expatriate spouse arrives back home, there may even be a 'welcome home' phase (De Cieri et al., 1991). After the positive experiences of catching up with family and friends have come to an end, the expatriate spouse needs to settle back into everyday lifestyles (De Cieri et al., 1991; Purgat-Popiela, 2011). The expatriate spouse may start asking 'what is next'. The relearning of life in the spouse's home country is "characterised by realistic appraisals of the environment and acceptance of the changes wrought by the passage of time and the different experiences of the repatriates and those in the home country" (De Cieri et al., 1991, p. 381).

#### 2.2.5 The theoretical origin of cross-cultural adjustment

A great deal of the theoretical foundation of cross-cultural adjustment and the process thereof, stems from Oberg's work on culture shock (Black & Gregersen, 1991; Oberg, 1960; Sims & Schraeder, 2004). As the theory evolved, other important contributions were added suggesting that when people first enter a new culture they are not sure what behaviour is acceptable (Black & Gregersen, 1991; Searle & Ward, 1990; Sims & Schraeder, 2004). As time passes they realise that some behaviours considered acceptable back home, are not accepted in the host country and that other behaviours that are considered offensive in their home countries are acceptable in the host country (Black & Gregersen, 1991; Sims & Schraeder, 2004). Therefore, culture shock is essentially a function of the stress induced by all the behavioural expectation differences and accompanying uncertainty with which the individual must cope (Adelman, 1988; Black & Gregersen, 1991). Thus, the cross-cultural adjustment process can further be elaborated on as "the

reduction of uncertainty by learning which behaviours are appropriate in the new culture and which ones are not" (Black & Gregersen, 1991, p. 463). Factors that create uncertainty and are not addressed, inhibit adjustment.

#### 2.2.6 Factors influencing cross-cultural adjustment

The process of cross-cultural adjustment can be positively influenced by the anticipation of cultural differences and possible challenges that may face the expatriates and their families. Anticipatory adjustment (Black & Gregersen, 1991) can be initiated, for example, by visiting the host country before the actual move to experience the culture first hand and to assist in creating realistic expectations for the assignment. Anticipatory adjustment can also be cultivated through pre-departure training provided by the organisation.

In-country adjustment starts to take place when the expatriate and expatriate family arrive in the host country (Black & Gregersen, 1991). In-country adjustment consists of the same phases described by De Cieri et al. (1991), in the adjustment cycle. As described before, there is a short 'honeymoon' phase before adjustment starts to take place (Black & Gregersen, 1991). This phase can last anywhere between a few weeks and two months after the arrival of the expatriate family and occurs due to the fascination with the new culture and country before the demands of everyday life becomes challenging (Black & Gregersen, 1991). Once the "honeymoon" phase has taken its course, the expatriate spouse may start to encounter a decline in morale as they start to recognise the differences that exist between behaviours that they deem appropriate and inappropriate in their own country compared to what is acceptable in the host country. Gradually, over time, the expatriate spouse starts to learn what is deemed appropriate and inappropriate behaviour in the host country, usually through trial and error, and starts to adjust. Thus, expatriate spouses who have been in the host country for more than two months would be expected to relate positively to spousal cross-cultural adjustment (Black & Gregerson, 1991).

Existing literature also identifies the importance of social support (Diener, 2012; Erdogan, Bauer, Truxillo, & Mansfield, 2012) for cross-cultural adjustment, describing the difficulty that expatriate spouses may encounter in developing a social network with the host country nationals and quite often developing withdrawal tendencies and becoming socially isolated as a result (Black & Gregersen, 1991; Haslberger, 2005). A pivotal part of culture shock (Oberg, 1960) is the sense of

losing one's friends back home, making the replacement of social networks important in cross-cultural adjustment (Haslberger, 2005). According to Black and Gregersen (1991), social support from host country nationals is important to spousal adjustment because the nationals understand the host culture, can provide information on and explanations of the host culture, and can provide feedback on the appropriateness of behaviours. This type of information and cues can collectively serve to reduce uncertainty regarding the general culture and facilitate spousal adjustment (Black & Gregersen, 1991).

Living conditions may also play an important role in determining spouse cross-cultural adjustment (Black & Gregersen, 1991). Due to the fact that many spouses do not work for the period of the international assignment, they spend most of their time either at home or engaging in activities related to the home. If life in your new home is significantly different to your life in your home country, you may become despondent about not having any source of comfort or familiarity in the host country.

Culture novelty plays a significant role in cross-cultural adjustment as the more novel and different a host country's culture is compared to the home culture, the more uncertainty one would expect concerning the appropriateness of behaviours (Black & Gregersen, 1991), once again highlighting the important impact that 'cultural distance' can have on adjustment (Haslberger, 2005; Palthe, 2004). Although research has indicated a negative influence of culture novelty on adjustment outcomes, this relationship is not always consistent (Haslberger, 2005). The most common aspect of culture novelty in cross-cultural adjustment is the distance between home and host cultures (i.e. cultural distance) (Haslberger, 2005). Hofstede and Bond (1984) distinguished four dimensions of national culture namely power distance, individualism, masculinity, and uncertainty avoidance (Haslberger, 2005). The cultural distance between the expatriate spouse's home culture and the host country's culture will differ for expatriate spouses coming from different countries. Some cultures are more closely related to the host culture than others, influencing the extent and the speed at which cross-cultural adjustment will occur. Previous expatriate experience may also aid the expatriate spouse's ability to adapt to a new culture if the previous experience was a positive one, and the cultures experienced are similar to the host country (Haslberger, 2005).

Because cross-cultural adjustment is a multifaceted construct, various antecedents may have different degrees of impact on each of the three facets (work, interaction and general) (Palthe, 2004). Some antecedents may not even relate to specific facets in any way, for example, the adjustment of the family is not necessarily related to work adjustment. The spouses' experiences cannot be generalised along with that of the expatriate, because they experience many challenges that are different to that of the expatriate as illustrated above. Therefore a need for research on

spouse specific cross-cultural adjustment has become apparent in the existing literature. Expatriate spouses typically face a multitude of non-work related responsibilities, usually with no immediate support group and no clear sense of identity when compared to expatriate employees who often gain identity via their careers and the organisations that they work for (Jones-Corley, 2002). Often spouses have to put their own careers aside to accompany the expatriate employee on the assignment and may struggle to accomplish tasks that would have been relatively simple in their home countries being hindered by language and cultural differences (De Cieri et al., 1991; Jones-Corley, 2002; Martens & Grant, 2008). Seeing their roles changing compared to their roles back home, the spouses may become discontent because of this reformulation of their identity in the different culture (Bechter & Stommel, 2011).

#### 2.2.7 More research needed in cross-cultural adjustment of expatriate spouses

Faced with a sense of changing identities and frustrations with cultural differences and language barriers, it is understandable that spouses also go through a period of challenging change and adjustment, making this an important factor to consider and investigate for future global assignment planning and implementation. Although a vast amount of literature exists on the cross-cultural adjustment of the expatriate during a global assignment, and the similarities that exist between the factors influencing the experiences of the expatriate and the expatriate spouse, current theories of expatriate adjustment are not adequate to explain spousal adjustment (Shaffer & Harrison, 2001). Understanding the effects of cross-cultural adjustment on the expatriate spouse, may possibly be the difference between a successful global assignment and a prematurely terminated one.

## 2.3 SUBJECTIVE WELL-BEING

In Chapter 1, Subjective-Well-Being was introduced as an important area of interest influencing the self-perceived adjustment of the expatriate spouse/partner. In psychology, 'happiness' is understood and treated within the concept of subjective well-being, and involves an individual's personal assessment of and judgement about his or her own life (Erdogan et al., 2012, Eryilmaz, 2011; Luhmann et al., 2012). As a component of Positive psychology, the scientific study of subjective well-being developed partly due to the immense focus on negative states in the field of psychology (Diener, Suh, Lucas, & Smith, 1999; Lyubomirsky et al., 2011). People do not only avoid misery, but also approach positive incentives. In addition to the shift of focus on positive incentives, people react differently to identical circumstances and evaluate conditions based on their unique expectations, values and previous experiences (Diener, 2012; Diener et al., 1999).

### 2.3.1 Subjective well-being defined

In the early years of subjective well-being research, a happy person was considered to be a "young, healthy, well-educated, well-paid, extroverted, optimistic, worry-free, religious, married person with high self-esteem, job morale, modest aspirations, of either sex and of a wide range of intelligence" (Wilson, 1967, p. 294). Investigations into subjective well-being or happiness and its resulting insights have evolved considerably since its initial conceptualisation. Although the demographics of a person may correlate strongly with the subjective well-being experienced, the processes that underlie happiness are important to identify and investigate (Erdogan et al., 2012). According to Diener (2012; Diener et al., 1999), along with the causal direction of demographic correlations and happiness, the interaction between internal factors need to be investigated, the processes underlying adaptation must be understood and existing theories on subjective well-being need to be amended in order to make more conclusive forecasts about how various factors affect this construct.

In the earlier years of study, subjective well-being or 'happiness' was treated as a uniform entity or a single construct, but it became clear later on that there are separable components that exhibit unique patterns of relationships with different variables (Diener, 2012; Diener et al., 1999). Therefore, subjective well-being is described as a general area of scientific interest rather than a single specific construct (Diener et al., 1999). As the world continues to develop, societal trends evolve, and priorities change. The "value of the individual, the importance of subjective views in evaluating life, and the recognition that well-being necessarily includes positive elements that

transcend economic prosperity” (Diener et al., 1999, p. 276) has become acutely apparent (Astroulakis & Marangos, 2013).

### 2.3.2 The components of subjective well-being

As mentioned in the previous sections, there are various components of subjective well-being. According to Diener (2012) subjective well-being is a wide array of occurrences that includes people's feelings or emotions (e.g. “My experiences are pleasant and rewarding”), domain satisfactions (e.g. work satisfaction, marital satisfaction), and cognitions associated with satisfaction with life (e.g. “My life is satisfying). Subjective well-being has three important elements namely, positive affect, negative affect and life satisfaction (Diener, 1984; Diener, 2012; Erdogan et al., 2012; Luhmann et al., 2012; Myers & Diener, 1995). Affective well-being refers to the prevalence of positive affect and absence of negative affect (Erdogan et al., 2012; Luhmann et al., 2012). Cognitive well-being refers to the cognitive evaluation of life overall or life satisfaction (Luhmann et al., 2012). Within the process of a person's current cognitive and affective evaluation of life, if the person experiences more pleasant events than unpleasant ones, and more life satisfaction in general, they will have higher subjective well-being.

Studies suggest that the most important variable influencing subjective well-being is need satisfaction (Erdogan et al., 2012). According to Wilson (1967, p. 302), ‘the prompt satisfaction of needs causes happiness, while the persistence of unfulfilled needs causes unhappiness; and the degree of fulfilment required to produce satisfaction depends on adjustment or aspiration level, which is influenced by past experiences, comparisons with others, personal values, and other factors’. Since Wilson put forth his two postulates on need satisfaction and subjective wellbeing, i.e. happiness, a shift has taken place from identifying which needs must be met for happiness to ensue to identifying the comparative factors that influence whether or not resources will influence well-being (Diener et al., 1999; Diener, Oishi & Lucas, 2009). Where the first of his two postulates emphasized the attempts to identify external, situational, or ‘bottom-up’ factors that consistently affect happiness as most of the literature from the early days of positive psychology suggested, the second postulate focuses on the top-down processes within the individual (Diener et al., 1999; Erdogan et al., 2012).

### 2.3.3 Discrepancy theories

On another spectrum, the multiple discrepancy theory of satisfaction suggests that individuals compare themselves with various perceived criteria for example, peers, strangers, ideals and goals (Diener et al., 1999; Erdogan et al., 2012). After comparing themselves to these standards or criteria, individuals assess their current state based on inconsistencies or discrepancies in comparison to their perceived ideal state (Diener et al., 1999). According to Michalos (1985) when an individual's perceived current state is lower than where they aspire to be, their subjective well-being lowers in parallel as a result. This is also true for the inverse situation where an individual's perceived state is better than aspired and results in an increase in subjective well-being (Diener, 2012).

One of the prominent discrepancy theories influencing subjective well-being in earlier studies and also today is the effects of social comparison. Earlier models suggested that one should be happy if others in your proximity are worse off and unhappy if others in your proximity are better off (Diener, 2012; Diener et al., 1999). Today, the definition has shifted away from this concrete simplified perception to include a more intricate view of social comparison, allowing for a variation of different types of information, extending material standards across the nations of the world, as well as the way in which this information is used in social comparison (Diener, 2012). Wood (1996) defined social comparison as "the process of thinking about information about one or more other people in relation to the self" (p. 520). Wood's definition of social comparisons stems a number of primary developments in terms of the individual's 'self', namely, procuring information about societal standards, considering these societal standards, and then comparing oneself to these standards (Diener et al., 1999; Thoits, 2014).

Social comparisons can occur by comparing one's self to peers, both proximate and foreign, and sometimes a subjective idea of what an 'ideal' person would be (Diener, 2012; Diener et al., 1999; Wood, 1996). Social comparisons are also not only limited to differences between individuals but also similarities, and involve cognitive, affective and behavioural responses that do not necessarily involve a perceived contrast between oneself and others (Diener et al., 1999). In relation to the first major process associated with Wood's (1996) definition, social comparison is a flexible process that is not necessarily focused on the proximate others, but could also be a coping mechanism, influenced by personality or performance (Diener et al., 1999, Erdogan et al., 2012). For example, people may refrain from social comparisons that will make them feel bad about themselves, but will engage in social comparison that they think will boost their confidence and ego. People's thinking about social information can also differ in terms of personality differences, where an optimistic

individual may focus on the number of people who did worse than they did to feel better about results, whereas pessimists or depressives tend to focus on people who have done better than they have, resulting in an exaggerated sense of failure (Diener & Fujita, 1995; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). This being said even if all people made the same types of social comparisons, i.e. upwards or downwards, they may not use this information in the same way (Diener, 2012). Therefore it becomes clear that the effects of social comparison on subjective well-being in natural settings may be more subtle than originally believed.

Diener (2012) suggests that an individual's aspirations may have a stronger influence on their subjective well-being as that of social comparisons (Erdogan et al., 2012). Wilson (1967) for one believed that high aspirations or goals have a threatening effect on happiness or subjective well-being. Modern day theories propose that an individual's well-being is influenced by the difference that exists amidst one's current state and aspired state. The general theoretical idea, however, is that those with unrealistically inflated goals tend to be unhappy due to the discouragement associated with the long gap between where he or she currently is and where they want to be (Diener, 2012). However, whether a person has inappropriately high or inappropriately low aspirations, both may have an effect on subjective well-being, which may in turn lead to anxiety or boredom (Diener et al., 1999). Research also suggests that it is probably not the absolute level of one's aspirations that effect subjective well-being, but rather how realistic the goals are and whether they are in line with one's personal resources that predict subjective well-being (Baumann, Kaschel & Kuhl, 2005; Diener et al., 1999).

Modern day theories propose that it is not only goal attainment itself that predicts subjective well-being, but also the process of moving towards those goals (Erdogan et al., 2012; Luhmann et al., 2012). As a result, people who have high aspiration but low outcomes may be satisfied or subjectively happy because they are still moving towards the aspired goals.

#### 2.3.4 Goals and life satisfaction

Diener (1984) suggested that people's behaviours are best explained by their aspirations and how successful they are in achieving their goals. Satisfaction with life may be influenced by these goals depending on how realistic they are how far away they are from being achieved (Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). Having well established goals can also help people preserve satisfaction and well-being in challenging times (Diener et al., 1999). This model of thinking illustrates the importance of considering internal factors that influence subjective well-being rather than only focusing on situational factors. Although situational factors also have an

effect on subjective well-being especially when they negatively influence progress towards goals, various resources have different predictive strengths for different people (Diener et al., 1999; Erdogan et al., 2012). An important finding related to this theory is the role that resources play on subjective well-being. When an individual has certain resources that relate to their goals, for example income, this is more likely to contribute to subjective well-being than resources that are not related to goals (Diener, 2012).

A person's ability to reach goals is largely dependent on their situational contexts, which is influenced by environmental circumstances (Diener, 2012; Erdogan et al., 2012; Luhmann et al., 2012; Oswald & Wu, 2010). According to Diener (2012), when striving towards a goal is likely to be rewarded in a certain context, these goals become more beneficial and take priority above others. For example, prisoners, who place great importance on physical fitness, generally feel more vigorous, whereas prisoners who place great importance on self-acceptance are found to suffer from greater depression (Diener et al., 1999). A person's needs also play a large role in the level of subjective well-being. The premise is that people have certain needs, which may or may not be consciously labelled, and that meeting these needs will lead to higher subjective well-being (Diener et al., 1999; Erdogan et al., 2012). When people adopt certain goals that are not associated with their needs, success in these goals will not necessarily enhance subjective well-being (Diener et al., 1999). Kasser and Ryan (1993) discovered that people, who rated financial success as more important than affiliation goals, self-acceptance, or community feeling, reported lower subjective well-being. Their research suggests that goals that fulfil intrinsic human needs may have a greater influence on subjective well-being than goals that aid extrinsic needs (Lyubomirsky et al., 2011). According to Diener et al. (1999, p. 284) "the goals must be appropriate to the person's motives and needs before the connection occurs and must be appropriate in the context of the individual's life". Of particular importance to the current study, is the role that culture plays when looking at the components of context. A person's commitment to his or her goals is most favourable when those goals are valued by and aided by the culture in which that person is immersed (Diener, 2012; Diener et al., 1999; Oswald & Wu, 2010). In the context of the current study, individuals who are on assignment in a foreign country may have particular goals that they wish to achieve or were in the process of working towards, and find that due to certain cultural differences, those goals need to be put on hold or even forgotten. This can have a very negative impact on a person's subjective well-being. On the other hand, the culture from which a person comes from could also impact a person's subjective well-being when entering a new culture which differs significantly from what the person is used to. If, for example, a person comes from a very individualistic culture where autonomy, self-sufficiency and independence is highly valued and move to a more collectivist cultured country

where these factors are not deemed important, this could also have an effect on an individual's subjective well-being (Diener, 2012; Diener et al., 1999). Because of this, different cultures assess various factors differently in terms of how they predict and influence subjective well-being. Certain aspects of life are weighted differently because goals differ in different cultures, but this does not mean that the construct of happiness does not exist in certain countries (Diener et al., 1999).

The biological or basic needs of individuals are an example of common needs that supersede the boundaries created by different cultures (Diener, 2012). Therefore it can be assumed that the fulfilment of basic physiological needs is predictive of subjective well-being across diverse cultures. Once all basic biological needs are met other intrinsic and extrinsic needs such as competence or income which can be influenced by culture become an important source of subjective well-being (Diener, 2012). In summation, simply having goals and having the resources to pursue achieving those goals is not enough to guarantee subjective well-being, but goals can act as standards or aspirations with subjective well-being acting as a yardstick that measures an individual's proximity to those things for which he or she strives (Diener et al., 1999).

### 2.3.5 Adaptation and coping

Modern day theories on subjective well-being essentially focus on the idea of adaptation and level of 'coping' that individuals experience in their everyday lives (Diener, 2012; Diener et al., 1999; Luhmann et al., 2012; Lyubomirsky et al., 2011). Just as the human body adjusts to changes in temperature or altitude, people can also to some degree adjust to both good and bad events so that they do not remain in a state of elation or despair (Diener et al. 1999; Luhmann et al., 2012). As our bodies adjust to certain events, the effects are decreased over time, and we become adjusted to the stimuli, so that when new events occur, we are more intensely impacted by it than things that happened in the past. Adaptation is often used interchangeably in psychology with adjustment (Luhmann et al., 2012). Adaptation or adjustment in this context is defined as the diminished responsiveness to repeated or continued stimuli (Helson, 1947; Luhmann et al., 2012). In its broadest sense, adaptation describes either a *status* or a *process* (Luhmann et al., 2012). The *status perspective* describes adaptation as a current state where someone is well adapted (or well adjusted) when his or her individual level of subjective well-being exceeds a specific criterion (Luhmann et al., 2012). Criteria can vary from an absolute such as being above neutral on a life satisfaction scale, to being compared to a specific comparison group (Luhmann et al., 2012). Adaptation to life events can be examined using a single assessment, as was done in this cross-sectional study.

The *process perspective* explicitly predicts the trajectory of subjective well-being over time within individuals (Luhmann et al., 2012). The adjustment or adaptation process is initiated by an external stimulus (e.g. moving to a foreign country) that causes a physiological or psychological response (e.g. decreased subjective well-being) (Luhmann et al., 2012). An example is illustrated in the psychological adjustment to relocation phases depicted in the cross-cultural adjustment subsection (Figure 2, p. 7). Over time the responsiveness diminishes and the level of subjective well-being returns to its previous level (Luhmann et al., 2012). Thus, the rate at which people adapt to certain events in their lives can have a significant impact on the level of subjective well-being, and how long it will take them to return to their previous levels of happiness. This will be discussed in further detail in the *Cross-cultural adjustment and subjective well-being* subsection.

### 2.3.6 Demographic influences on subjective well-being

Although Wilson's (1967) conclusions have been deemed insufficient in understanding the complexity of the area of study known as subjective well-being, there are still many demographic factors or domains that largely influence how happy a person is. Wilson's conclusions were based on who is the *most* happy, not necessarily the lack of or presence of subjective well-being in an individual. Based on Wilson's definition of who the happy people are; young, well-educated, well-paid, religious, married persons, with high job morale, of either sex, health, income, religion, marital status, age, sex differences, job morale, education and intelligence can affect subjective well-being to varying degrees (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Wilson, 1967).

Studies consistently show a strong relationship between subjective well-being and both physical and psychological health (Diener, 2012; Diener et al., 1999; Dolan, Peasgood & White, 2008; Wilson, 1967). Psychological health appears to be more strongly correlated with subjective well-being than physical health, as a person's perceived state of health may be higher than their actual physical health (Diener et al., 1999; Dolan et al., 2008). A previous study conducted by Brief, Butcher, George and Link found that subjectively perceived health leads to an increase in subjective well-being, whereas negative affect and objective health assessments may decrease levels (Brief, Butcher, George and Link in Diener et al., 1999). Therefore, a person's subjective evaluation of their health, whether it is positive or negative, has a significant effect on their subjective well-being. Even in cases of disability, evidence suggests that individuals adapt somewhat to disability status, finding that the length of time that an individual has experienced the disability reduces the negative impact of the disability (as mentioned in the previous subsection) (Dolan et al., 2008).

Income was and still is assumed to have a positive influence on subjective well-being (Diener, 2012; Dolan, et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011), believing that the more you earn the happier you will be. Unfortunately the data suggests it is not that simple. The data from studies on the effects of income on subjective well-being do not support a strong causal path from income to subjective well-being, and more complex models are needed to explain all of the results. The results generally suggest a positive but diminishing return to income (Dolan et al., 2008). Some of this positive association is likely to be due to future incomes, some is likely to be due to reverse causation as indicated by studies which show higher well-being leading to higher future incomes, and some is likely to be due to unobserved individual characteristics such as personality factors (Dolan et al., 2008). This does not mean that wealth has no effect on the subjective well-being of an individual, as wealth may provide the means to meet specific biological/basic needs. Financial needs are met with the level of one's income and this can have an effect on subjective well-being as a source of need gratification (Erdogan et al., 2012). People who are considered wealthy are only *somewhat* happier than poor people in rich nations, whereas wealthy nations appear much happier than poor ones (Diener, 2012). Additionally, changes in income do not necessarily have the predicted effects, considering one's expectations and goals (Diener et al., 1999). Studies show that people who value money higher than other goals are less satisfied with their standard of living and with their lives than others (Diener et al., 1999).

Religion and participatory religiosity (e.g. attending church) has been shown to have a significant correlation with subjective well-being, irrespective of faith (Ellison, 1991; Diener, 2012; Dolan et al., 2008). A number of large studies have shown that subjective well-being is significantly related to religious certainty including prayer practices, perceived bond with the deific and how involved individuals are in religious acts (Diener et al., 1999). These aspects influence subjective well-being even after demographic variables have been controlled for (Diener, 2012; Diener et al., 1999; Dolan et al., 2008; Ellison, 1991; Ellison, Gay, & Glass, 1989; Pollner, 1989; Poloma & Pendleton, 1991). Ellison's study indicating that religious factors produce between 5%-7% of life satisfaction discrepancy, however, religiosity only causes approximately 2%-3% discrepancy in affective well-being (Ellison in Diener et al., 1999). Religious affiliation and beliefs are therefore primarily cognitive in their provision of a basis by which individuals can interpret their experiences.

There are many studies on the relationship between subjective well-being and marriage (Dolan et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012), the majority of which have shown a positive correlation between the two (e.g. Diener, Gohm, Suh, & Oishi, 2000; Dolan et al., 2008). Regular sex has also been shown to be associated with more positive subjective well-being and the effects are strongest when this is with the same partner (Dolan et al., 2008). A number of large studies

show that married people tend to be happier than those who are not (Diener et al., 1999; Erdogan et al., 2012). Being married and being happy is not as simple as it may seem as people who live with their partners, but are not married, also show higher levels of subjective well-being than those who live alone (Dolan et al., 2008). Generally speaking being alone appears to be worse for subjective well-being than being part of a partnership (Dolan et al., 2008). The effects of marriage may also differ for men and women, for example, previous studies have found that marriage holds greater benefits for men than for women in terms of positive emotions, but married men and women do not necessarily differ in life satisfaction (Diener et al., 2000; Diener et al., 1999). Cultural features may play a role in the relationship between marital status and subjective well-being which may in turn result in contradictory findings. For example, an individualistic culture may show that unmarried partners are happier or more satisfied than married ones. (Diener et al., 2000; Diener et al., 1999). In contrast, in collectivist cultures when partners live together they generally report lower subjective well-being than their married or single counterparts (Diener et al., 1999). This could indicate that collectivist cultures generally have a more conservative outlook on living together before marriage. Marriage therefore cannot be seen as the definitive causal element in levels of subjective well-being but rather has certain elements that promote well-being, for example, cohabitation.

In Wilson's (1967) description of what constitutes happiness, youth is perceived as a constant predictor of happiness or subjective well-being. However, extensive studies appear to challenge this assumption. Other studies have found that subjective well-being and life satisfaction actually increases in some instances with age (Diener et al., 1999; Herzog & Rogers, 1981; Horley & Lavery, 1995; Larson, 1978). Studies suggest a U-shaped curve with higher levels of subjective well-being at the younger and older age points and the lowest life satisfaction occurring in middle age, between 32 and 50 years, depending on the study (Dolan et al., 2008). Dolan, Peasgood and White (2008) note that the U-shaped relationship found when many age-related differences in life circumstances (income, health, employment, etc.) have been controlled for may be misleading since it says little about how the subjective well-being of young and old compare to those at the middle age (Dolan et al., 2008).

Studies based on the differences in subjective well-being of the two sexes have resulted in a very small comparative difference (Diener et al., 1999; Dolan et al., 2008). This suggests that other correlates may also be more important than gender, given that different studies have different control variables (Dolan et al., 2008). When specific subsets are examined the gender effect often disappears (Dolan et al., 2008).

Job morale is a particularly important example of a demographic factor that influences subjective well-being as a person's job provides opportunity for social relationships to form, provides

gratifying challenges, as well as a sense of worth and identity (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012). This is an interesting factor to consider when addressing the subjective well-being of the expatriate spouse as many spouses do not work in the host country, robbing them of the opportunity to create these social relationships, and to have an identity and sense of meaning outside of the home. A large majority of expatriate spouses are women, and studies dating back as far as 1989 showed an increase in the relation between job satisfaction and life satisfaction as their roles in society changed and careers available to them expanded (Diener et al., 1999; Tait, Padgett, & Baldwin, 1989). The spill-over hypothesis suggests that the work experiences of individuals colours non-work experiences, and non-work satisfaction tends to have a high correlation with life satisfaction (Dolan et al., 2008). In other words, in the case of the expatriate spouses who have sacrificed careers to accompany their spouses may be affected negatively in terms of their non-work satisfaction in the host country.

Although it was not identified in Wilson's definition of what happiness entails, community involvement has also been found in some studies to have a positive relationship with subjective well-being (Dolan et al., 2008). Previous studies have found that both individual involvement in non-church organisation and national average membership of non-church organisations are significantly positively related to life satisfaction (Dolan et al., 2008).

Lastly, education has been shown to have a small but significant correlation with subjective well-being. Some studies have found a positive relationship between each individual level of education and subjective well-being while others have found that middle level education is related to the highest life satisfaction (Dolan et al., 2008). There is some evidence that education has more of a positive impact on low income countries (Dolan et al., 2008), than high income countries. The coefficient on education is often responsive to the inclusion of other variables, for example, education is likely to be positively correlated with income and health, and if these are not controlled for we would expect the education coefficient to be more strongly positive (Dolan et al., 2008). Education may also contribute to the achievement of goals and allowing individuals to adapt more readily to changing environments (Diener et al., 1999).

### 2.3.7 Self-determination theory

A very important theory relating to need satisfaction and subjective well-being is the self-determination theory (SDT). Earlier studies suggested that subjective well-being is primarily influenced by temperament rather than life circumstances, however, there is also evidence that subjective well-being varies as a function of an individual's life choices (Howell, Chenot, Hill, &

Howell, 2011; Schüler, Brandstätter & Sheldon, 2013). Therefore it is important to investigate and consider the various behaviours associated with increased subjective well-being. SDT suggests that individuals have three universal innate psychological needs, namely competence, relatedness, and autonomy, and a person's subjective well-being will be at its highest when individuals engage in behaviours that satisfy these three needs (Eryilmaz, 2011; Howell et al., 2011). Therefore, fulfilling psychological needs is just as important to provide the necessary elements for subjective well-being, as physiological needs are important for survival and happiness (Howell et al., 2011).

Competence is described by Howell et al. (2011, p. 2) as “the need for challenges and experiences that produce increased self-efficacy—the sense that one has the capacity to bring about a desired outcome”. It refers to overcoming and succeeding in exceedingly difficult circumstances, persisting until the desired outcome has been reached, and experiencing effectance when attaining desired outcomes (Eryilmaz, 2011; Schüler et al., 2013). Increased subjective well-being can be predicted by feelings of competence across various outcomes such as physical health, vitality, and self-esteem (Erdogan et al., 2012; Howell et al., 2011).

Relatedness refers to building trust based on mutual respect; establishing a sense of communion with others which is accompanied by the experience of reciprocal care and concern for others (Eryilmaz, 2011; Schüler et al., 2013). It is “the need to feel connection with others, to belong, and to form interpersonal bonds” (Howell et al., 2011, p. 2). Both physical and mental well-being is influenced by attachment to significant others and a sense of belongingness (Erdogan et al., 2012; Howell et al., 2011).

Autonomy involves making choices and taking initiative for one's own behaviours (Erdogan et al., 2012; Eryilmaz, 2011). It refers to the experience of being the initiator or author of one's own behaviour and is associated with feelings of choice and psychological freedom (Schüler et al., 2013). According to Howell et al. (2011, p. 2) “individuals perceive their daily choices to be autonomous when their behaviours are freely selected and in line with a self-directed area of interest or value”. Therefore, when individuals are in the process of achieving self-directed goals, higher levels of subjective well-being are experienced, whereas when they are working towards extrinsically motivated goals, there is likely to be a decline in or lower levels of well-being (Diener, 2012; Erdogan et al., 2012; Howell et al., 2011).

Studies show that when adults meet their needs for competence, relatedness and autonomy they become healthier and experience more subjective well-being (Eryilmaz, 2011). These basic psychological needs are considered innate, rather than learnt, requirements in the sense that the satisfaction of these needs is necessary for optimal functioning, psychological growth, and well-being (Schüler et al., 2013). These innate requirements exist regardless of individual differences

such as gender, social class, and personality traits, and exist whether an individual acknowledges their importance or not (Schüler et al., 2013). On the other hand, failure to meet these innate psychological needs could result in the development of pathologies and could lead to more illness (Eryilmaz, 2011). The difference between individuals is the extent to what these psychological needs are being met (Schüler et al., 2013).

Research has connected various positive outcomes to the satisfaction of these psychological needs which aid in emphasising its importance. Need satisfaction is, for example, positively related to adaptive psychological functioning, subjective well-being, health-behaviour change, and intrinsic motivation and had even been shown to predict a longer life span (Schüler et al., 2013). A person's level of need fulfilment also varies in both the short and long terms (Howell et al., 2011). Therefore, changes in psychological need satisfaction from either moment-to-moment (i.e. within the day) or day-to-day (i.e. between the days) should impact momentary and daily well-being respectively (Howell et al., 2011). Individuals high on various trait-level well-being constructs such as self-determination, effectance, and connectedness, show the strongest correlation between daily psychological need satisfaction and daily well-being (Howell et al., 2011).

### 2.3.8 Conclusion

Early research on subjective well-being was limited to the various resources and demographic factors that correlated with the construct (Diener, 2012; Diener et al., 1999; Dolan et al., 2008). Although a lot has been contributed to the field and to our understanding of subjective well-being in the past few decades, the most important contribution could be the understanding that external, bottom-up factors often are responsible for only a fraction of the variance in Subjective well-being, and that one's temperament and cognitions, psychological needs, goals, culture, and adaptation coping efforts moderate the effects of life circumstances and events on subjective well-being (Diener et al., 1999; Howell et al., 2011; Schüler et al., 2013).

## 2.4 CROSS-CULTURAL ADJUSTMENT AND SUBJECTIVE WELL-BEING

Evidence suggests that adaptation or adjustment to events in one's life is an important factor in understanding subjective well-being (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). Life events can be defined as "time-discrete transitions that mark the beginning or the end of a specific status" (Luhmann et al., 2012, p. 594). Life events can be examined from two major perspectives namely a stress perspective and developmental perspective (Luhmann et al., 2012). From a stress perspective, life events are viewed as specific types of stressors that significantly disturb the daily routine (Luhmann et al., 2012). From the developmental perspective life events are viewed as specific transitions, defined as a "discontinuity in a person's life space of which he (or she) is aware and which requires new behavioural responses" (Luhmann et al., 2012, p. 594). The duration of these transitions can vary from fast and discrete to slow and continuous (Luhmann et al., 2012).

Various studies have been conducted to investigate the subjective well-being of individuals who have experienced 'life changing' events and how these events affect the level of subjective well-being. Many of these results provided evidence of the effects of adaptation or adjustment (Luhmann et al., 2012). In the early days of research on adaptation and adjustment researchers proposed that events such as winning the lottery, getting married, getting hired, getting fired, buying a car and then wrecking it, should not affect the level of subjective well-being for more than a few months because people adapt quickly and inevitably to any life changes (Luhmann et al., 2012). Brickman, Coates, and Janoff-Bulman (1976) conducted a study on the effects of winning the lottery on the subjective well-being of individuals, and contradictory to expectation, after some time had passed people who had won the lottery were not significantly happier than those who have not (Diener 2012; Diener et al., 1999; Luhmann, 2012).

Another study conducted by Silver in 1982 showed that people who had suffered spinal injuries showed an improved positive affect after approximately two months after the injury occurred in which they had time to come to terms with their circumstances (Silver in Diener et al., 1999). Mehnert, Krauss, Nadler and Boyd (1990) conducted a study on the effects of the chronological significance of the time at which injuries occur in life, and again, contradictory to expectation, people who had suffered a spinal injury later in life appeared to exhibit higher levels of satisfaction and well-being than those who were for example born with a disability, even after controlling for employment status, income, and marital status. Krause and Sternberg (1997) conducted a study

identifying the relationship between aging and long-term adjustment in people with spinal cord injuries, a longitudinal design, isolating the influence of chronological age, time since injury, and environmental adjustment between 1985 and 1994. Time lapse since injury was shown to have a positive relationship with adjustment and environmental change was associated with decreased subjective well-being (Krause & Sternberg, 1997).

Although the examples given are positive indications of an individual's ability to adapt to circumstances, it cannot be assumed that adaptation or adjustment will be complete or happen at the same pace for everyone (Diener, 2012). A number of people adapt slower to certain circumstances than others (Diener, 2012). For example, Stroebe, Stroebe, Abakoumin, & Schut (1996), conducted a study on the levels of depression amongst people who have been widowed, showing that although cases of depression were rife, this declined over long periods of time.

Previous studies also indicated that the caregivers of patients with incurable diseases show decreasing levels of subjective well-being as time passes by (Vitaliano, Russo, Young, Becker & Maiuro, 1990). People who were born in and reside in poverty stricken countries have been shown to have much lower levels of subjective well-being than those in more affluent countries, despite having been poor for centuries (Diener, Diener, & Diener in Diener et al., 1999). In summary, people's ability to adapt to events in their lives differ in terms of the time it takes to adjust, the degree to which they adjust and whether it is necessary to adjust at all (Diener et al., 1999).

Recent longitudinal studies suggest that adaptation or adjustment to conditions is more intricate and that circumstances can have a large impact on subjective well-being (Diener, 2012). It may take many years for adaptation to occur and sometimes adaptation is not complete (Diener, 2012). For example, although people on average often adapt to marriage so that it no longer makes them happier or unhappier than before, they do not fully adapt to some conditions such as unemployment or severe disabilities (Diener, 2012; Erdogan et al., 2012). Research on heritability of subjective well-being, the stability of personality and the phenomenon of hedonic adaptation suggests that it should be very difficult if not impossible to become a lastingly happier person, however evidence from recent experimental intervention studies suggests that well-being can indeed be increased, at least in the short term, and possibly over longer periods of time (Lyubomirsky et al., 2011). Although people may be predisposed to adapt to positive life experiences relatively swiftly, engaging in happiness increasing activities (such as committing to important goals, meditating, acting kindly towards others, thinking optimistically, or expressing gratitude) has the potential to improve levels of happiness for significant periods of time (Lyubomirsky et al., 2011).

The questions that surround the concept of adaptation when considering subjective well-being are do people habituate to steadily worsening conditions or can they only adapt to single-occasion

events, and does adaptation represent a decrease in the magnitude of emotional reaction, a recalibration of one's scale for hedonic experiences, or an adjustment in people's goals and their strategies of living (Diener et al., 1999; Lyubomirsky et al., 2011)? A complete theory on subjective well-being must be able to explain the effects of the sequential context of events; when adaptation occurs, what processes are responsible for adaptation, and any limits to individuals' abilities to adapt (Diener, 2012).

It is important to distinguish between the concepts adaptation (adjustment) and coping. The difference between adaptation and habituation is with adaptation the focus is on the active role that the individual plays rather than the automatic biological process (Diener, 2012; Luhmann et al., 2012). For example, a study conducted by Folkman discovered that the religious beliefs of caregivers of HIV patients influence how they view regular events, giving them a positive view and better coping (Folkman in Diener et al., 1999). McCrae and Costa also found in a similar study that certain coping behaviours were considered effective coping responses by participants, including rational action, pursuing help, drawing strength from hard times, and conviction (McCrae & Costa in Diener et al., 1999). These forms of coping were also associated with higher subjective well-being levels among participants (Diener et al., 1999). In summary there are numerous processes that underlie adjustment and coping and each process has a different effect on an individual's ability to adjust, their components of subjective well-being and how long it takes them to adjust (Diener, 2012; Diener et al., 1999).

Similarly, the diverse processes underlying cross-cultural adjustment of expatriate spouses, the amount of subjective well-being they experience, and how various factors associated with cross-cultural adjustment affect the various components of subjective well-being may vary between different demographic groups and occur in varying lengths of time. The changes in subjective well-being levels and the occurrence of depression and other severe negative states are not caused and influenced by the same factors (Diener 2012; Diener et al., 1999; Erdogan et al., 2012). As a result, more research is needed on the effects of cross-cultural adjustment and various demographic factors on the subjective well-being of expatriate spouses.

## 2.5 CHAPTER SUMMARY

As the number of expatriate assignments rapidly increases, it is becoming abundantly clear that there is a growing need to investigate the effects that expatriation has on the expatriate and the expatriate family. Numerous studies have shown that the expatriate spouse can have a paramount effect on the turnover intention of the expatriate which in turn can have great financial implications for the company. A plethora of literature exists on the cross-cultural adjustment of the expatriate, but limited research has been conducted on the cross-cultural adjustment of the expatriate spouse and the effects thereof on their subjective well-being.

Cross-cultural adjustment is a multifaceted and complex process that affects individuals on both a psychological dimension as well as a socio-cultural dimension. A great deal of the cross-cultural adjustment theoretical foundation stems from Oberg's work on culture shock. It affects three facets of expatriate life namely general adjustment, interaction adjustment and work adjustment. Due to the fact that most expatriate spouses are not employed in host countries, general and interaction adjustment is the primary focus.

Psychological adjustment takes place over a number of phases starting with the honeymoon phase and ending with the repatriation process. There are many factors that may influence the adjustment of the expatriate spouse for example anticipation, social support, employment possibilities, and living conditions. These various antecedents have different degrees of impact on cross-cultural adjustment.

Subjective well-being is a multi-layered area of study with various influencing factors contributing to perceived well-being. Earlier theories believed certain demographic factors were what influenced subjective well-being but modern day theories illustrated the influence of internal factors as well. Subjective well-being is made of various elements namely positive affect, negative affect, and life satisfaction. Need satisfaction plays an integral role in the perceived well-being of an individual, perhaps being the most influential variable. Self-determination theory illustrates the three universal psychological needs that individuals have namely competence, relatedness and autonomy. On the other hand, discrepancy theories of satisfaction illustrate the tendency for individuals to compare themselves to multiple standards including other people, past conditions, aspirations, and ideal levels of satisfaction, needs and goals. Demographic factors such as marital status, income, perceived health, and religion have varying effects on subjective well-being, illustrating the importance of not excluding demographic factors entirely.

Adaptation and coping effects on subjective well-being becomes a very important factor when considering the expatriate spouse's contextual situation. The ability to adjust to events in one's life is an important factor in understanding subjective well-being. Moving to a foreign country on an expatriate assignment can be viewed here as a significant event in the expatriate spouse's life, catalysing a number of emotional responses and psychological processes. Different people adapt and cope differently to various situations, being influenced by various antecedents that have both positive and negative effects. The diverse processes that underlie cross-cultural adjustment may have different effects on the various components of subjective well-being and may vary between different demographic groups and occur in varying lengths of time, thus creating a need for more research on the effects of cross-cultural adjustment of the expatriate spouse on their subjective well-being.

## CHAPTER 3. ARTICLE

# The effects of international relocation on expatriate partners' subjective well-being

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### ABSTRACT

**Orientation:** In a world where the importance of international business continues to grow, the global platform for expatriate assignments is increasing. Research indicates that one of the primary reasons for premature turnover of assignments is the expatriate spouse's inability to adjust to the new culture.

**Research Purpose:** Due to the high financial stakes associated with global assignments it is important to understand the factors contributing to early turnover intention. According to the literature many expatriate spouses have a more difficult time adjusting to expatriate life because they are more fully immersed in the host culture through daily activities and lack the social support that a work context may provide. The purpose of this study was to investigate the relationship between the spouse's cross-cultural adjustment and their subjective well-being, and to compare different demographic groups.

**Motivation for study:** The focus of the study was to identify whether there is a positive relationship between weak cross-cultural adjustment and low subjective well-being and whether different demographic factors play a role or have an effect. This study aims to add valuable information to the existing literature and also assist with understanding the experiences of the expatriate spouse.

**Research design, approach and method:** A quantitative study was conducted using a cross-sectional survey design targeting expatriate spouses stationed in Germany. Purposive sampling was

used and participants based in various areas of Germany formed the sample group for the data analysis (N=156).

**Main findings/results:** The relationship between cross-cultural adjustment and subjective well-being showed a statistically significant correlation between the two constructs. Various demographic factors, including having dependents, language proficiency, current length of stay, nationality, career sacrifice and support networks related to cross-cultural adjustment levels significantly.

**Practical implications:** The cross-cultural adjustment of the expatriate spouse has a significant effect on their level of subjective well-being which in turn could affect the turnover intention of the expatriate family. International organisations need to recognise the influence that expatriate spouses have on early turnover intention and incorporate initiatives to provide support to the expatriate spouse in various domains to help prevent premature turnover.

**Contributions/value-add:** These findings contribute to a deeper understanding of the relationship between cross-cultural adjustment and subjective well-being of expatriate spouses and the effect that various demographic factors can have on both constructs.

## KEY WORDS

Cross-cultural adjustment, subjective well-being, expatriate spouse, psychological adjustment, demographic, expatriation, self-determination theory, discrepancy theories, need satisfaction, psychological needs, work adjustment, interaction adjustment, general adjustment, culture shock, social support, life satisfaction, positive affect, negative affect

## INTRODUCTION

As the global platform for expatriate assignments grows, and the number of expatriates living abroad increases, research has rapidly increased in this area. Ensuring the success of expatriate assignments is of vital importance to the organisations involved because it is a means by which information sharing, knowledge transfers and organisational routine transmissions can be executed (Purgat-Popiela, 2011). Expatriates are typically highly qualified employees whose skills and development are paramount to the organisation (Brewster, Bonache, Cerdin, & Suutari, 2014). To

send employees to associated international companies is usually accompanied by high financial implications, making it all more imperative that the global assignments are successful. For many companies in South Africa and worldwide, sending employees abroad to develop global competencies is furthermore frequently consistent with their overall strategic human resource plan (van der Bank & Rothmann, 2006).

An area of research that has been somewhat neglected is the impact of international assignments on the expatriate spouse (Black & Gregerson, 1991; van Erp, Giebles, van der Zee & van Duijn, 2011; Palthe, 2004). Several studies indicate that apart from the cross-cultural adjustment of the expatriate him/herself, spousal adjustment difficulties are viewed as the main cause for the failure of expatriate assignments (Ali, van der Zee & Sanders, 2003; Black & Stephens, 1989; Bhashkar-Shrinivas, Harrison, Shaffer & Luk; 2005; Caligiuri, Hyland, Joshi, & Bross, 1998; Long, 2010). Previous studies have shown that the expatriate spouse's adjustment can have a positive and significant effect on the expatriate's cross-cultural adjustment, which in turn can affect the performance of the expatriate and their intention to terminate the international assignment prematurely (Ali et al., 2003; Purgat-Popiela, 2011).

In most cases, spouses don't have a formal support network in the host country and are more fully immersed in the new culture through daily domestic responsibilities (Martens & Grant, 2008). They may also struggle with issues of self-esteem and identity as their careers are often put on hold so that they can accompany their partner on the global assignment (De Cieri, Dowling, & Taylor, 1991; Jones-Corley, 2002; Martens & Grant, 2008). These are just a few of the factors that may have a significant effect on the expatriate spouse's adjustment to life in the host country, illustrating the importance of further investigation into the cross-cultural adjustment of the expatriate spouse.

Ali et al. (2003) reported that approximately 80% of the expatriates around the world were married, and more than 60% of these spouses accompanied the expatriates abroad. More than a decade later, this number has significantly increased and has started to include not only spouses, but partners of expatriates as well. This makes the relationship a primary concern for investigation for organisations making use of international business assignments.

## **Background to the study**

Expatriation and the success and failure of international assignments have become a prominent feature in international human resource management studies. Successful expatriate assignments are indispensable to multinational companies for both developmental and functional reasons (Takeuchi, Yun, Tesluk, 2002; van der Bank & Rothmann, 2006). Many mid-sized and large companies currently have expatriates residing abroad, and more than half of these companies plan to increase the number of international assignees (Purgat-Popiela, 2011). The scale of international assignment failure still remains a significant focus for research as it reaches approximately 25-40% of the total expatriation level in developed countries and approximately 70% in developing countries (Purgat-Popiela, 2011). The two most frequently cited reasons for assignment failure are expatriate problems with cross-cultural adjustment and expatriate spouse problems with cross-cultural adjustment in the host country (Ali et al., 2003; Black & Stephens, 1989; Bhashkar-Shrinivas, Harrison, Shaffer & Luk; 2005; Caligiuri, Hyland, Joshi, & Bross, 1998; Long, 2010). The spouse's ability to function effectively in a new culturally different environment provides an indication of their cross-cultural adjustment. It is a complex process in which the spouse ideally becomes capable of functioning effectively in a culture other than the one that they were originally socialised in (Haslberger, 2005).

More often than not, the expatriate spouse does not have a formal support network when they first arrive in the host country and soon start to feel socially isolated and lonely (Black & Gregersen, 1991; Haslberger, 2005; Martens & Grant, 2008). This forms a pivotal part of 'culture shock' where the spouse experiences a sense of losing their friends back home, making the replacement of social networks very important in cross-cultural adjustment (Haslberger, 2005). The subjective well-being or mental state that the spouse experiences in the new environment forms part of the psychological dimension of adjustment (De Cieri et al., 1991). The psychological phases of cross-cultural adjustment, ranges over the entire duration of the assignment and continues on into the repatriation of the expatriate and the spouse. The relationship between the spouse's adjustment and their subjective well-being becomes an important consideration in view of psychological adjustment.

The phases of psychological adjustment are in turn influenced by the socio-cultural adjustment for both the expatriate and the expatriate spouse. This is the ability to adjust to interactions in the host country (i.e. the difficulty of dealing with everyday life) (Kraimer, Wayne & Jaworski, 2001; Purgat-Popiela, 2011). There are three facets associated with socio-cultural adjustment proposed by

Black, Mendenhall and Oddou (1991), consisting of work adjustment, interaction adjustment and general adjustment. The three facets are influenced by various factors categorised into individual and work-related factors, of which spousal adjustment was originally categorised as a non-work factor for expatriate cross-cultural adjustment, but later studies and empirical research exhibited the spouse or partner's adjustment as a separate and crucial factor, positively influencing all expatriate adaptation dimensions (Purgat-Popiela, 2011). Many expatriate spouses do not work during the period of the global assignment therefore the spousal adjustment scale excludes the work-related adjustment from the socio-cultural facets that are investigated.

The primary objective of the present study is to empirically examine the cross-cultural adjustment of the expatriate spouse, what individual factors have a significant influence, and how this relates to their subjective well-being. Certain demographic factors were also examined to determine whether they have any significant impact on the cross-cultural adjustment of the expatriate spouse which in turn would influence their subjective well-being. By assessing the relationships between these variables, the study may provide valuable information regarding the cross-cultural adjustment of the expatriate spouse and create more awareness of the importance of assessing what kind of support is provided for the spouse.

Research on the cross-cultural adjustment and subjective well-being of the expatriate spouse will not only benefit the industrial and organisational psychologists and human resource practitioners, but also multinational corporations who invest in international assignments, the expatriates themselves and the children who form part of the expatriate family. It is anticipated that the findings from this study may add to informing future organisational interventions for expatriate assignments, specifically in terms of the inclusion of the expatriate spouse in the preparation, training and support before, during and after the assignment.

The next section of the article will consist of a literature review creating the context for the present study, which will include a deeper look at cross-cultural adjustment, subjective well-being and the demographic factors that may play a role, after which the research design will be discussed and elaborated on. The research design will be followed by a summarised presentation of the results and a discussion of the findings of the study. The article will conclude with a summary of the main conclusions, implications for practice and recommendations for future research.

## **Trends from the research literature**

### **Cross-cultural adjustment**

The study of cross-cultural variables dates back to the 1930's when George Peter Murdock, an anthropologist from Yale conducted the first cross-cultural survey (Goodenough, 1994). Since then the concept and the study thereof has grown alongside the globalisation of the world, and especially the business world. Cross-cultural adjustment can generally be defined as the process of adaptation that an individual goes through, living and sometimes working in a foreign country (Bonache & Carlos, 2014; Palthe, 2004). It can further be described as the degree to which an individual is psychologically comfortable with the various aspects of a new cultural setting (Black & Gregersen, 1991). An individual's ability to function effectively in a new culturally different environment provides an indication of the individual's level of cross-cultural adjustment. It is a complex process in which an individual becomes capable of functioning effectively in a culture other than the one that they were originally socialised in (Haslberger, 2005).

Culture can be and is often described as the collective programming of the mind and consists of shared patterns of behaviour which serve as a framework for future behaviour of a group (Williams, 2008). Culture is patterns of thinking that is developed during childhood; a form of 'programming' of the mind that begins within the family home, schools and community (Long, 2010). Each country has a different culture, some differing more or less in comparison to others. Many countries like South Africa have different cultures within their own borders creating a melting pot of unique patterns and habits colliding and combining with one another. Culture novelty or 'cultural distance' between the expatriate spouse's culture and the host culture plays a significant role on adjustment as uncertainty arises concerning the appropriateness of behaviours (Black & Gregersen, 1991; Haslberger, 2005; Palthe, 2004). At the most fundamental level this can cause what Oberg (1960) described as 'culture shock' (Sims & Schraeder, 2004). Culture shock can be defined as "the emotional disruption often experienced by persons when they pay an extended visit to or live for some time in a society that is different from their own" (Reber & Reber, 2001, p. 170).

A great deal of the theoretical foundation of cross-cultural adjustment and the process thereof, stems from Oberg's work on culture shock (Black & Gregerson, 1991; Oberg, 1960; Sims &

Schraeder, 2004). As the theory evolved, other important contributions were added suggesting that when people first enter a new culture they are not sure what behaviour is acceptable (Black & Gregersen, 1991; Searle & Ward, 1990; Sims & Schraeder, 2004), but as time passes they realise that other behaviours considered acceptable back home, are unacceptable in the host country (Black & Gregersen, 1991; Sims & Schraeder, 2004). Therefore, culture shock is essentially a function of the stress induced by all the behavioural expectation differences and accompanying uncertainty with which the individual must cope (Adelman, 1988; Black & Gregersen, 1991). Thus, the process of cross-cultural adjustment can further be elaborated on as “the reduction of uncertainty by learning which behaviours are appropriate in the new culture and which ones are not” (Black & Gregersen, 1991, p. 463). Factors that create uncertainty and are not addressed may inhibit adjustment.

Earlier studies on adjustment in cross-cultural settings conceptualised cross-cultural adjustment as a one-dimensional construct (Black & Gregersen, 1991; De Pamich, 2006; Palthe, 2004), but more recent conceptualisations identified cross-cultural adjustment as a multifaceted construct (Black et al., 1991; Chang, 1997; Palthe, 2004), that occurs within two interrelated dimensions, namely socio-cultural adjustment and psychological adjustment (Ali et al., 2003; Caligiuri et al., 1998, De Cieri et al., 1991; Purgat-Popiela, 2011; Schaffer & Harrison, 1998; Searle & Ward, 1990; Takeuchi et al., 2002; van Aswegen, 2009; van der Bank & Rothmann, 2006; Vogel & van Vuuren, 2008).

According to Black, Gregersen and Mendenhall (1992), cross-cultural adjustment takes place across three different facets, namely work adjustment, interaction adjustment, and general adjustment (Black & Gregersen, 1991; Black, Mendenhall, & Oddou, 1991; Chang, 1997; Palthe, 2004), which forms the socio-cultural dimension of adjustment. Different antecedents relate to different facets of cross-cultural adjustment (Black & Gregersen, 1991; Purgat-Popiela, 2011) therefore it is important to distinguish between these three facets because not all important factors are equally related, or even at all, to all three facets (Chang, 1997). Puck, Holtbrügge and Dölling (2003) conducted a review of existing studies on the factors that influence cross-cultural adjustment of expatriates and compiled a table with the information on the correlation types. This table includes the influence of the expatriate spouse on the cross-cultural adjustment facets of the expatriate, treating it as a separate and crucial factor positively influencing all expatriate adaptation dimensions (Purgat-Popiela, 2011). Purgat-Popiela (2011) captured the various factors influencing the adjustment of the expatriate spouse or partner in a similar table to illustrate the specific factors associated with spousal cross-cultural adjustment, including personal, organisational and cultural/environmental influences.

Work adjustment involves the adjustment to the new job, its roles and tasks, the new work environment and the responsibilities that are included (Black et al., 1991; Kraimer et al., 2001; Palthe, 2004; Purgat-Popiela, 2011), and is considered to be the easiest of the three dimensions of adjustment because the job is usually aided by similarities in procedures, policies and requirements of the foreign operation and home-country operation tasks (Black et al., 1992; Chang, 1997). Interaction adjustment involves the comfort of the individual in interacting with the host country's nationals in both work and non-work situations (Black et al., 1991; Kraimer et al., 2001; Palthe, 2004; Purgat-Popiela, 2011), and is considered to be the most difficult facet of adjustment due to cultural distance (Black et al., 1991; Chang, 1997). Lastly, general adjustment involves the overall adaptation to living in a foreign environment and culture (Black et al., 1991; Chang, 1997; Kraimer et al., 2001; Palthe, 2004; Purgat-Popiela, 2011). Factors influencing daily life are usually categorised into this dimension including living conditions, housing, food, health care, and cost of living (Palthe, 2004).

Psychological adjustment refers to an individual's change in psychological characteristics and the surrounding context, in order to achieve a better fit, or greater harmony between the individual and their environment (De Cieri et al. 1991; Long, 2010). The psychological perspective of the adjustment process highlights the emotions experienced at the time of the global assignment, including anxiety, homesickness, satisfaction, frustration and stress (Purgat-Popiela, 2011). The phases of psychological adjustment is dynamically described by De Cieri et al. (1991, p. 377-413), and takes place throughout the assignment, continuing into the repatriation of the expatriate family into their home country. The expatriate and expatriate spouses initially go through a *honeymoon* phase where they may experience an unrealistically positive appraisal of their new surroundings followed by a feeling of the *party's over* (the second phase), loaded with negative appraisals and attitudes towards the host country (De Cieri et al, 1991; Purgat-Popiela, 2011). Before adjustment starts to occur they experience culture shock, where uncertainty about appropriate behaviours arises. As the expatriates begin to deal with these uncertainties, they enter the third phase, namely the *turning point*, where they begin to become accustomed to the host culture and its various differences and continue into the fourth phase namely healthy recovery (De Cieri et al., 1991). In some cases, the expatriate or the expatriate spouse does not adjust to the new culture and enters a state of crisis where they start to perceive a sense of impossibility to ever adjust to the host country and become despondent as a result (De Cieri et al., 1991; Purgat-Popiela, 2011).

The final phase of psychological adjustment is the *repatriation phase* where the expatriate and the spouse return to their home country and have to be repatriated into their home context (De Cieri et al., 1991).

As indicated in Table 1, there are many factors that may influence the cross-cultural adjustment of the expatriate and the expatriate spouse alike, such as previous expatriate experience, social support, motivation to go overseas, communication and language skills, previous knowledge of the host country and cultural flexibility (Puck et al., 2003; Purgat-Popiela, 2011). Because cross-cultural adjustment is a multifaceted construct, various antecedents may have different degrees of impact on the various facets of adjustment, creating a need for further investigation into the cross-cultural adjustment of the spouse specifically. Seeing their roles changing compared to their roles in their home countries, the spouses may become discontent because of this reformation of their identity in the different culture (Becter & Stommel, 2011).

### **Subjective well-being**

In positive psychology, 'happiness' is understood and treated within the concept of subjective well-being (Seligman, 2008), and involves an individual's personal assessment of and judgement about his or her own life (Eryilmaz, 2011). As a component of positive psychology, the scientific study of subjective well-being developed partly due to the immense focus on negative states in the field of psychology (Diener, Suh, Lucas, & Smith, 1999, Lyubomirsky, Dickerhoof, Boehm & Sheldon, 2011). People do not only avoid misery, but also approach positive incentives. In the early years of subjective well-being research, Wilson (1967, p. 294) described a happy person as a "young, healthy, well-educated, well-paid, extroverted, optimistic, worry-free, religious, married person with high self-esteem, job morale, modest aspirations, of either sex and of a wide range of intelligence". This view of subjective well-being has changed considerably since its original conceptualisation, identifying underlying processes of subjective well-being that play a significant role. According to Diener (2012; Diener et al., 1999), along with the causal direction of demographic correlations and happiness, the interaction between internal factors need to be investigated, the processes underlying adaptation must be understood, and existing theories on subjective well-being need to be amended in order to make more conclusive forecasts about how various factors affect this construct.

Subjective well-being is a multidimensional construct (contradicting earlier theories of unidimensionality) consisting of a wide array of occurrences that includes people's feelings or emotions (e.g. "My experiences are pleasant and rewarding"), domain satisfactions (e.g. work satisfaction, marital satisfaction), and cognitions associated with satisfaction with life (e.g. "My life is satisfying). Subjective well-being has three important elements namely, positive affect, negative affect and life satisfaction (Diener, 1984; Diener, 2012; Erdogan, Bauer, Truxillo & Mansfield, 2012; Luhmann, Hofmann, Eid & Lucas, 2012; Myers & Diener, 1995). Affective well-being refers to the prevalence of positive affect and absence of negative affect (Erdogan, Bauer, Truxillo & Mansfield, 2012; Luhmann et al., 2012). Cognitive well-being refers to the cognitive evaluation of life overall or life satisfaction (Luhmann et al., 2012). Within the process of a person's current cognitive and affective evaluation of life, if the person experiences more pleasant events than unpleasant ones, and more life satisfaction in general, they will have higher subjective well-being.

Studies suggest that the most important variable influencing subjective well-being is need satisfaction (Erdogan et al., 2012). According to Wilson (1967, p. 302), "the prompt satisfaction of needs causes happiness, while the persistence of unfulfilled needs causes unhappiness; and the degree of fulfilment required to produce satisfaction depends on adjustment or aspiration level, which is influenced by past experiences, comparisons with others, personal values, and other factors". The self-determination theory suggests that apart from basic physiological needs, individuals have three universal innate psychological needs, namely competence, relatedness and autonomy, and a person's subjective well-being will be at its highest when individuals engage in behaviours that satisfy these three needs (Eryilmaz, 2011; Howell, Chenot, Hill & Howell, 2011).

Competence is described by Howell et al. (2011, p. 2) as "the need for challenges and experiences that produce increased self-efficacy—the sense that one has the capacity to bring about a desired outcome". It refers to overcoming and succeeding in exceedingly difficult circumstances, persisting until the desired outcome has been reached, and experiencing effectance when attaining desired outcomes (Eryilmaz, 2011; Schüler, Brandstätter & Sheldon, 2013). Increased subjective well-being can be predicted by feelings of competence across various outcomes such as physical health, vitality, and self-esteem (Howell et al., 2011).

Relatedness refers to building trust based on mutual respect; establishing a sense of communion with others which is accompanied by the experience of reciprocal care and concern for others (Eryilmaz, 2011; Schüler et al., 2013). It is "the need to feel connection with others, to belong, and

to form interpersonal bonds” (Howell et al., 2011, p. 2). Both physical and mental well-being is influenced by attachment to significant others and a sense of belongingness (Howell et al., 2011).

Autonomy involves making choices and taking initiative for one's own behaviours (Eryilmaz, 2011). It refers to the experience of being the initiator or author of one's own behaviour and is associated with feelings of choice and psychological freedom (Schüler et al., 2013). According to Howell et al. (2011, p. 2) “individuals perceive their daily choices to be autonomous when their behaviours are freely selected and in line with a self-directed area of interest or value”. Therefore, when individuals are in the process of achieving self-directed goals, higher levels of subjective well-being are experienced, whereas when they are working towards extrinsically motivated goals, there is likely to be a decline in or lower levels of well-being (Howell et al., 2011).

Studies show that when adults meet their needs for competence, relatedness and autonomy they become healthier and experience more subjective well-being (Eryilmaz, 2011). These basic psychological needs are considered innate, rather than learnt, requirements in the sense that the satisfaction of these needs is necessary for optimal functioning, psychological growth, and well-being (Schüler et al., 2013). These innate requirements exist regardless of individual differences such as gender, social class, and personality traits, and exist whether an individual acknowledges their importance or not (Schüler et al., 2013). The difference between individuals is the extent to what these psychological needs are being met (Schüler et al., 2013).

Research has connected various positive outcomes to the satisfaction of these psychological needs which aid in emphasising its importance. Need satisfaction is, for example, positively related to adaptive psychological functioning, subjective well-being, health-behaviour change, and intrinsic motivation and has even been shown to predict a longer life span (Schüler et al., 2013). A person's level of need fulfilment also varies in both the short and long terms (Howell et al., 2011). Therefore, changes in psychological need satisfaction from either moment-to-moment (i.e. within the day) or day-to-day (i.e. between the days) should impact momentary and daily well-being respectively (Howell et al., 2011). Individuals high on various trait-level well-being constructs such as self-determination, effectance, and connectedness, show the strongest correlation between daily psychological need satisfaction and daily well-being (Howell et al., 2011).

The literature on subjective well-being includes considerations from the multiple discrepancies theory perspective where the important component of satisfaction is influenced by individuals comparing themselves with various perceived criteria for example, peers, strangers, ideals and goals. (Diener et al., 1999; Erdogan et al., 2012). After comparing themselves to these standards or

criteria, individuals assess their current state based on inconsistencies or discrepancies in comparison to their perceived ideal state (Diener et al., 1999). According to Michalos (1985) when an individual's perceived current state is lower than where they aspire to be, their subjective well-being lowers in parallel as a result. This is also true for the inverse situation where an individual's perceived state is better than aspired and results in an increase in subjective well-being (Diener, 2012). Wood (1996) defined social comparison as 'the process of thinking about information about one or more other people in relation to the self' (p. 520). Wood's definition of social comparisons stems a number of primary developments in terms of the individual's 'self', namely, procuring information about societal standards, considering these societal standards, and then comparing oneself to these standards (Diener et al., 1999; Thoits, 2014).

Diener (2012) suggests that an individual's aspirations may have a stronger influence on their subjective well-being as that of social comparisons (Erdogan et al., 2012). Wilson (1967) for one believed that high aspirations or goals have a threatening effect on happiness or subjective well-being. Modern day theories propose that an individual's well-being is influenced by the difference that exists amidst one's current state and aspired state. The general theoretical idea, however, is that those with unrealistically inflated goals tend to be unhappy due to the discouragement associated with the long gap between where he or she currently is and where they want to be (Diener, 2012). Modern day theories propose that it is not only goal attainment itself that predicts subjective well-being, but also the process of moving towards those goals (Erdogan et al., 2012; Luhmann et al., 2012). As a result, people who have high aspiration but low outcomes may be satisfied or subjectively happy because they are still moving towards the aspired goals.

Diener (1984) suggested that people's behaviours are best explained by their aspirations and how successful they are in achieving their goals. Satisfaction with life may be influenced by these goals depending on how realistic they are how far away they are from being achieved (Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). Having well established goals can also help people preserve satisfaction and well-being in challenging times (Diener et al., 1999). This model of thinking illustrates the importance of considering internal factors that influence subjective well-being rather than only focusing on situational factors. Although situational factors also have an effect on subjective well-being especially when they negatively influence progress towards goals, various resources have different predictive strengths for different people (Diener, 2012). Culture can play a significant role on the types of goals that individuals set especially with regards to individualistic cultures and collective cultures (Diener, 2012; Diener et al., 1999). In the context of the current study, if, for example, a person comes from a very individualistic culture where

autonomy, self-sufficiency and independence is highly valued and move to a country where these factors are not deemed important, this could also have an effect on an individual's subjective well-being (Diener, 2012; Diener et al., 1999). As a result, different cultures assess various factors differently in terms of how they predict and influence subjective well-being.

Although Wilson's (1967) original conclusions are considered too simplistic to truly describe the concept of subjective well-being, demographic factors can still have a large impact on an individual's subjective well-being. Studies show that there is a strong correlation between perceived health and subjective well-being (Diener, 2012; Diener et al., 1999; Dolan, Peasgood & White, 2008; Wilson, 1967). A previous study conducted by Brief, Butcher, George and Link found that subjectively perceived health leads to an increase in subjective well-being, whereas negative affect and objective health assessments may decrease levels (Brief, Butcher, George and Link in Diener et al., 1999). Income is still assumed to have a large positive influence on subjective well-being although study data shows otherwise.

*Income* was and is still assumed to have a positive influence on subjective well-being (Diener, 2012; Dolan, et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011), believing that the more you earn the happier you will be. However, studies on the impact of income on an individual's subjective well-being, shows that there is not a strong causal path from income to well-being, with results generally suggesting a positive but diminishing return to income (Dolan et al., 2008).

*Religion* and participatory religiosity has shown to have a significant effect on subjective well-being with a number of large studies showing that subjective well-being is significantly related to religious certainty, including prayer practices, perceived bond with the deific, and how involved individuals are in religious acts (Diener et al., 1999). These aspects influence subjective well-being even after demographic variables have been controlled for (Diener, 2012; Diener et al., 1999; Dolan et al., 2008; Ellison, 1991; Ellison, Gay, & Glass, 1989; Pollner, 1989; Poloma & Pendleton, 1991). Ellison's study in 1991 indicated that religious factors produce between 5%-7% of life satisfaction discrepancy, however, religiosity only causes approximately 2%-3% discrepancy in affective well-being (Ellison in Diener et al., 1999). Religious affiliation and beliefs are therefore primarily cognitive in their provision of a basis by which individuals can interpret their experiences (Ellison in Diener et al., 1999).

There are many studies on the relationship between subjective well-being and marriage (Dolan et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012), the majority of which have shown a positive

correlation between the two (e.g. Diener, Gohm, Suh, & Oishi, 2000). A number of large studies show that married people tend to be happier than those who are not (Diener et al., 1999; Erdogan et al., 2012). However cultural features may play a role in the relationship between marital status and subjective well-being which may in turn result in contradictory findings. For example, an individualistic culture may show that unmarried partners are happier or more satisfied than married ones (Diener, 2012; Diener et al., 2000; Diener et al., 1999). In contrast, in collectivist cultures when partners live together they generally report lower subjective well-being than their married or single counterparts (Diener et al., 1999).

In Wilson's (1967) description of what constitutes happiness, youth is perceived as a constant predictor of happiness or subjective well-being. However, extensive studies appear to challenge this assumption. Studies have found that subjective well-being and life satisfaction actually increases in some instances with age (Diener et al., 1999; Dolan et al., 2008; Herzog & Rogers, 1981; Horley & Lavery, 1995; Larson, 1978). These studies suggest a U-shaped curve with higher levels of subjective well-being at the younger and older age points and the lowest life satisfaction occurring in middle age, between 32 and 50 years, depending on the study (Dolan et al., 2008). Dolan, Peasgood and White (2008) note that the U-shaped relationship found when many age-related differences in life circumstances (income, health, employment, etc.) have been controlled for may be misleading since it says little about how the subjective well-being of young and old compare to those at the middle age (Dolan et al., 2008).

Studies based on the differences in subjective well-being of the two sexes have resulted in a very small comparative difference (Diener et al., 1999; Dolan et al., 2008). This suggests that other correlates may also be more important than gender, given that different studies have different control variables (Dolan et al., 2008). When specific subsets are examined the gender effect often disappears (Dolan et al., 2008).

Job morale is a particularly important example of a demographic factor that influences subjective well-being as a person's job provides opportunity for social relationships to form, provides gratifying challenges, as well as a sense of worth and identity (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012). This is an interesting factor to consider when addressing the subjective well-being of the expatriate spouse as many spouses do not work in the host country, denying them of the opportunity to create these social relationships, and to have an identity and sense of meaning outside of the home. The spill-over hypothesis suggests that the work experiences of individuals colours non-work experiences, and non-work satisfaction tends to have a

high correlation with life satisfaction (Dolan et al., 2008). In other words, in the case of the expatriate spouses who have sacrificed careers to accompany their spouses may be affected negatively in terms of their non-work satisfaction in the host country.

Although it was not identified in Wilson's definition of what happiness entails, community involvement has also been found in some studies to have a positive relationship with subjective well-being (Dolan et al., 2008). Previous studies have found that both individual involvement in non-church organisation and national average membership of non-church organisations are significantly positively related to life satisfaction (Dolan et al., 2008).

Lastly, education has been shown to have a small but significant correlation with subjective well-being. Some studies have found a positive relationship between each individual level of education and subjective well-being while others have found that middle level education is related to the highest life satisfaction (Dolan et al., 2008). There is some evidence that education has more of a positive impact on low income countries (Dolan et al., 2008), than high income countries. The coefficient on education is often responsive to the inclusion of other variables, for example, education is likely to be positively correlated with income and health, and if these are not controlled for we would expect the education coefficient to be more strongly positive (Dolan et al., 2008). Education may also contribute to the achievement of goals and allowing individuals to adapt more readily to changing environments (Diener et al., 1999).

### **Cross-cultural adjustment and subjective well-being**

Evidence suggests that adaptation or adjustment to events in one's life is an important factor in understanding subjective well-being (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). Various studies have been conducted to investigate the subjective well-being of individuals who have experienced 'life changing' events and how these events affect the level of subjective well-being. Many of the results provide evidence of the effects of adaptation or adjustment (Luhmann et al., 2012). In the early days of research on adaptation and adjustment researchers proposed that events such as winning the lottery, getting married, getting hired, getting fired, buying a car and then wrecking it, should not affect the level of subjective well-being for more than a few months because people adapt quickly and inevitably to any life changes (Luhmann et al., 2012). Brickman, Coates, and Janoff-Bulman (1976) conducted a

study on the effects of winning the lottery on the subjective well-being of individuals, and contradictory to expectation, after some time had passed people who had won the lottery were not significantly happier than those who have not (Diener 2012; Diener et al., 1999; Luhmann, 2012). Another study conducted by Silver in 1982 showed that people who had suffered spinal injuries showed an improved positive affect after approximately two months after the injury occurred in which they had time to come to terms with their circumstances (Silver in Diener et al., 1999). Mehnert, Krauss, Nadler and Boyd (1990) conducted a study on the effects of the chronological significance of the time at which injuries occur in life, and again, contradictory to expectation, people who had suffered a spinal injury later in life appeared to exhibit higher levels of satisfaction and well-being than those who were for example born with a disability, even after controlling for employment status, income, and marital status.

Krause and Sternberg (1997) conducted a study identifying the relationship between aging and long-term adjustment in people with spinal cord injuries, a longitudinal design, isolating the influence of chronological age, time since injury, and environmental adjustment between 1985 and 1994. Time lapse since injury was shown to have a positive relationship with adjustment and environmental change was associated with decreased subjective well-being (Krause & Sternberg, 1997).

Although the examples given are positive indications of an individual's ability to adapt to circumstances, it cannot be assumed that adaptation or adjustment will be complete or happen at the same pace for everyone (Diener, 2012). A number of people adapt slower to certain circumstances than others (Diener, 2012). For example, Stroebe, Stroebe, Abakoumin, & Schut (1996), conducted a study on the levels of depression amongst people who have been widowed, showing that although cases of depression were rife, this declined over long periods of time.

Previous studies also indicated that the caregivers of patients with incurable diseases show decreasing levels of subjective well-being as time passes by (Vitaliano, Russo, Young, Becker & Maiuro, 1990). People who were born in and reside in poverty stricken countries have been shown to have much lower levels of subjective well-being than those in more affluent countries, despite having been poor for centuries (Diener, Diener, & Diener in Diener et al., 1999). In summary, people's ability to adapt to events in their lives differ in terms of the time it takes to adjust, the degree to which they adjust and whether it is necessary to adjust at all (Diener et al., 1999).

Recent longitudinal studies suggest that adaptation or adjustment to conditions is more intricate and that circumstances can have a large impact on subjective well-being (Diener, 2012). It may take

many years for adaptation to occur and sometimes adaptation is not complete (Diener, 2012). For example, although people on average often adapt to marriage so that it no longer makes them happier or unhappier than before, they do not fully adapt to some conditions such as unemployment or severe disabilities (Diener, 2012; Erdogan et al., 2012). Research on heritability of subjective well-being, the stability of personality and the phenomenon of hedonic adaptation suggests that it should be very difficult if not impossible to become a lastingly happier person, however evidence from recent experimental intervention studies suggests that well-being can indeed be increased, at least in the short term, and possibly over longer periods of time (Lyubomirsky et al., 2011). Although people may be predisposed to adapt to positive life experiences relatively swiftly, engaging in happiness increasing activities (such as committing to important goals, meditating, acting kindly towards others, thinking optimistically, or expressing gratitude) has the potential to improve levels of happiness for significant periods of time (Lyubomirsky et al., 2011).

The questions that surround the concept of adaptation when considering subjective well-being are whether people can only adapt to single catalysts or can they adjust to adverse situations over time, and what constitutes adjustment, a decrease in emotional response, an modification of perception for pleasurable experiences or a change in goals and aspirations (Diener et al., 1999; Lyubomirsky et al., 2011). A comprehensive theory for subjective well-being should clarify the chronological context of circumstances, what factors contribute to adjustment, and the restrictions to people's abilities to adjust (Diener, 2012).

It is important to distinguish between the concepts adaptation (adjustment) and coping. The difference between adaptation and habituation is with adaptation the focus is on the active role that the individual plays rather than the automatic biological process (Diener, 2012; Luhmann et al., 2012). For example, a study conducted by Folkman discovered that the religious beliefs of caregivers of HIV patients influence how they view regular events, giving them a positive view and better coping (Folkman in Diener et al., 1999). McCrae and Costa also found in a similar study that certain coping behaviours were considered effective coping responses by participants, including rational action, pursuing help, drawing strength from hard times, and conviction (McCrae & Costa in Diener et al., 1999). These forms of coping were also associated with higher subjective well-being levels among participants (Diener et al., 1999). In summary there are numerous processes that underlie adjustment and coping and each process has a different effect on an individual's ability to adjust, their components of subjective well-being and how long it takes them to adjust (Diener, 2012; Diener et al., 1999).

Similarly, the diverse processes underlying cross-cultural adjustment of expatriate spouses, the amount of subjective well-being they experience, and how various factors associated with cross-cultural adjustment affect the various components of subjective well-being may vary between different demographic groups and take place over different periods of time. The changes in subjective well-being levels and the occurrence of depression and other severe negative states are not caused and influenced by the same factors (Diener 2012; Diener et al., 1999; Erdogan et al., 2012). As a result, more research is needed on the effects of cross-cultural adjustment and various demographic factors on the subjective well-being of expatriate spouses.

### **Research objectives**

Various researchers have conducted empirical studies in an attempt to understand what antecedents influence the premature turnover of expatriates on international assignments. Numerous global studies have been conducted to also ascertain the relationship between cross-cultural adjustment and expatriate turnover intention (Martens & Grant, 2008; van Erp, Giebels, van der Zee, & van Duijn, 2011). Common findings have noted that expatriates' premature turnover intention and difficulty in adjusting to the host country is often related to the expatriate spouse or partner and family's issues with adjusting to the host country.

Essentially there is a paucity of research studies conducted in the global context on the effects of expatriation on the expatriate spouse, and the individual variables that influence that cross-cultural adjustment such as subjective well-being and various demographic factors. In this regard, research about these variables could make a valuable contribution to organisations in understanding the reason why expatriates terminate their assignments prematurely, in the global context.

The primary objectives of the study were to explore the relationship between subjective well-being and cross-cultural adjustment, and how the two constructs influence each other. Although many researchers have considered adjustment and subjective well-being as synonymous, for the purposes of this study, adjustment and subjective well-being was explored as two distinct but conceptually linked constructs. The secondary research objective of the study was to incorporate primary findings with different demographic characteristics, for example gender, age, nationality and previous overseas experience, and to investigate whether the different groups differed significantly regarding these variables.

### **The potential contribution of the study**

The study aims to benefit not only the industrial and organisational psychologists and human resource practitioners, but also multinational corporations who invest in international assignments and then indirectly the expatriate spouses themselves through new human resource initiatives. The study attempts to facilitate understanding regarding why expatriate spouses have difficulty adjusting to the host country, therefore most likely influencing the expatriate's subjective well-being, and ultimately, their premature turnover intention. It was anticipated that the findings from this study could inform future organisational interventions for expatriate assignments, specifically in terms of the inclusion of the expatriate spouses/partners in the preparation, training and support before, during and after the assignment.

## **RESEARCH DESIGN**

The research design in this study refers to the research approach, the research method and information about the research procedure including sampling, data collection and analysis.

### **Research approach**

For the purpose of this study a cross-sectional survey design targeting expatriate spouses/partners stationed in Germany was used, with the main aim of describing the empirical relationship between the variables (Rindfleisch et al., 2008). Purposive sampling was implemented to target a subset of the expatriate spouse population to help answer the research questions of interest. This research design was chosen to measure the different demographics groups of expatriate spouses' cross-cultural adjustment at one specific point in time so that an empirical relationship can be investigated between the constructs. Surveys were used to prompt information from the respondents about their beliefs, opinions, characteristics and past or present behaviour (Rindfleisch et al., 2008; Terre

Blanche et al., 2006). The primary data collected from the sample (N=156) was analysed using the Analysis of Variance (ANOVA). The ANOVA was used to compare the means per subgroup to determine the statistical significance between groups and constructs (P-values). Pearson product-moment correlation coefficients were used to measure the linear correlation between the two variables. Cronbach Alphas were calculated to test for internal consistency/reliability of tests used.

## **Research method**

The hypotheses are as follows:

H0<sub>1</sub>: Spouses/Partners' adjustment, specifically interaction and general adjustment, will not be positively related to their subjective well-being.

H1<sub>1</sub>: Spouses/Partners' adjustment, specifically interaction and general adjustment, will be positively related to their subjective well-being.

H0<sub>2</sub>: Various demographic factors will have no influence on the expatriate spouse/partner's ability to adjust.

H1<sub>2</sub>: Various demographic factors influence the expatriate spouse/partner's ability to adjust.

## **Research participants**

The population comprised of expatriate spouses/partners contacted through a local international women's association, social media, and social networks, whom are all currently based in Germany on international contracts. Nonprobability sampling, specifically purposive sampling was used to determine the sample of 156 expatriate spouses/partners. The defining characteristics of the sample size were that they are expatriate spouses/partners who are residing in Germany for 6 months to 5 years, depending on the length of the international assignment. The sample consisted of spouses/partners of expatriates based in various parts of the host country (Germany). Identified participants were emailed the questionnaire, via a link, where they then had to complete and upload the survey. Some participants did not complete all of the questions in the survey, resulting in 130

complete cases overall. This was considered sufficient so values for the missing values were not imputed. Missing values were ignored, which means that the calculated scores were based on different numbers of cases.

Table 2 illustrates the frequency distribution of the demographic factors of the participants in the study. The gender distribution of the total group was 98.08% females and 1.92% Males, with the ages of the participants ranging between 18 to 29 years (42.95%), 30 to 39 years (44.23%), 40-49 years (9.62%), and 50 to 59 years (3.21%). The percentage of participants who had children under the age of 18 accompany them on the expatriate assignment was slightly more than half of the sample population (55.77%). The language proficiency of the participants was distributed between 'Not at all' (35.26%), 'Moderately' (43.59%), and 'Fluently' (21.15%), indicating that most of the participants had at least a moderate proficiency in the German language (64.74%). The duration of current residence in the host country ranged between 0 to 3 months (23.72%), 4 to 7 months (6.41%), 8 to 11 months (7.05%), 1 to 2 years (16.03%), 2 to 3 years (10.26%), and more than 3 years (36.54%). The prior overseas experience distribution of the group was 58.11% had lived abroad before the current expatriate assignment, and 41.89% had not.

The majority of the participants originally come from the United States of America, making up 43.92% of the sample population. The rest of the participants' home countries were distributed between Canada (28.38%), European countries (12.84%), South Africa (7.43%), United Kingdom (4.73%), and 'Other' countries (2.03%). Due to the number of participants coming from different European countries and other countries being relatively small, they were grouped together to ensure data usability and to protect anonymity. More than half of the participants indicated that they have a small social support network in the host country (66.89%). On the other hand, 13.51% of the participants indicated that they have a large social support network, and 19.59% indicated that they have no social support network in the host country.

The employment status of the participants in the host country were categorised into full-time or part-time employment (14.86%), volunteering (4.05%), and unemployed (81.08%). From the total sample population, 77.70% indicated that they had given up a career to accompany their spouse on the global assignment.

Table 2  
Frequency distributions for demographic factors of participants

		Total Group N= 156
	N	Percentage
Gender		
Female	153	98.08%
Male	3	1.92%
Age		
18-29 years	67	42.95%
30-39 years	69	44.23%
40-49 years	15	9.62%
50-59 years	5	3.21%
Above 60 years	0	0.00%
Children		
Yes	87	55.77%
No	69	44.23%
Language Proficiency		
Not at all	55	35.26%
Moderately	68	43.59%
Fluently	33	21.15%
Duration in host country		
0-3 months	37	23.72%
4-7 months	10	6.41%
8-11 months	11	7.05%
1-2 years	25	16.03%
2-3 years	16	10.26%
More than 3 years	57	36.54%
Home country (nationality)		
Canada	42	28.38%
United States of America	65	43.92%
South Africa	11	7.43%
United Kingdom	7	4.73%
European countries	19	12.84%
Other countries	3	2.03%
Prior overseas experience		
Yes	86	58.11%
No	62	41.89%
Employment status		
Full time/Part time	22	14.86%
Volunteering	6	4.05%
Not working	120	81.08%
Career sacrifice		
Yes	115	77.70%
No	33	22.30%
Social support network		
Yes (large)	20	13.51%
Yes (small)	99	66.89%
No	29	19.59%

### Measuring instruments

The assessment was divided into four parts, namely a biographical section, cross-cultural adjustment section, subjective well-being section and turnover intent section. The instruments that were used are:

Spousal Adjustment Scale. The Spousal Adjustment Scale (Black & Stephens, 1989) was developed from the widely used expatriate adjustment scale, and is a commonly used measuring instrument of expatriate spousal adjustment. Spousal adjustment is comprised of two factors, namely interaction adjustment (3 items) and general adjustment (6 items). Items are measured on a 7-point Likert scale ranging from 1 (Completely unadjusted) to 7 (Completely adjusted). Essentially, the Spousal Adjustment Scale measures the extent to which an expatriate spouse or partner has adjusted to their new environment (host country). The general adjustment sub-scale measures the extent to which the spouse has adjusted to the culture, surroundings and novelty of the host country and the interaction adjustment sub-scale measures the extent to which the spouse has adjusted to interacting with the nationals in the host country. Black and Stephens (1989) reported the scale for spouse general adjustment has a reliability of .86, and the scale for the spouse interaction adjustment scales has a reliability of .95. This is indicative that the instrument is reliable in measuring the construct of spousal/partner adjustment.

Scale of Positive and Negative Experience (SPANE). The Scale of Positive and Negative Experience (SPANE) is designed to assess subjective feelings of well-being and ill-being (Diener et al., 2010). This 12-item questionnaire includes six items to assess positive feelings and six items to assess negative feelings. For both the positive and negative items, three of the items are general and three per subscale are more specific (Diener et al., 2010). Each SPANE item is scored on a 5-point Likert scale ranging from 1 (very rarely or never) to 5 (very often or always). The positive and negative scales are scored separately because of the partial independence or separability of the two types of feelings. Diener et al. (2010) reported a .89 Cronbach alpha for the scale as a whole, and .87 for the positive items, and .81 for the negative items. This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being.

Satisfaction with Life Scale (SWLS). The Satisfaction with Life Scale (SWLS), measures the cognitive component of subjective well-being (Erdogan et al., 2012; Lyubomirsky et al., 2011;

Pavot & Diener, 1993). The SWLS items are global rather than specific in nature, allowing respondents to weight domains of their lives in terms of their own values, in arriving at a global judgement of life satisfaction (Erdogan et al., 2012; Pavot & Diener, 1993). The scale consists of 5 items measured on a 7-point Likert scale, ranging from 1 (Strongly Disagree) to 7 (Strongly Agree). The scale has been validated in countries including Brazil, the Netherlands, Russia, and China, among others (Erdogan et al., 2012). SWLS shows more stability than one's mood and it also has convergence with peer and family evaluations of life satisfaction (Erdogan et al., 2012). Pavot and Diener (1993) examined the SWLS for both reliability and sensitivity and results showed a strong internal reliability and moderate temporal stability. The reported coefficient alpha of the scale is .87 (Lyubomirsky et al., 2011). This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being. .

*Flourishing Scale (FS)*. The Flourishing Scale (FS) is designed to measure social-psychological prosperity, describing important aspects of human functioning ranging from positive relationships, to feelings of competence, to having meaning and purpose in life, to complement existing measures of subjective well-being (Diener et al., 2010). The FS consists of 8 items measured on a 7-point Likert scale ranging from 1 (Strongly Disagree) to 7 (Strongly Agree). All items are phrased in a positive direction. Diener et al. (2010) reported a .87 Cronbach alpha for the Flourishing Scale. This indicates that this sub-scale of subjective well-being is reliable in contributing to the measurement of the construct, subjective well-being.

### **Research procedure**

The study was conducted over a period of four months and included expatriate spouses and partners from all across Germany. The completion of the survey was voluntary and completed at the participants' own discretion. The questionnaire was uploaded on a survey service provider to which the researcher had private access to insure security of the data. The purpose of the research and intended use of the results was explained to the participants in an introductory letter as part of the survey. It was clearly stated that by completing the survey, the participants were giving the researcher consent to make use of the collected data. Anonymity was ensured by omitting any questions that would indicate the identities of the participants. Countries of origin were grouped into general categories where necessary to assist in protecting participants' anonymity. Validity was ensured by using models and theories relevant to the research topic, aims and problem statement,

and measuring instruments were selected that are applicable to the models and theories informing the study and are presented in a standardised manner. Research process reliability was ensured by only inviting expatriate spouses and partners currently residing in Germany to participate in the study, keeping all research data secure and using the correct statistical analyses to analyse the data received and ensure reliability in analysis.

### **Statistical analysis**

The statistical analysis was performed using the SPSS (Statistical Package for the Social Sciences) programme.

A quantitative research approach was used for this study and the statistical data was processed and analysed by means of descriptive, inferential and correlational statistics. Analysis of Variance (ANOVA) was carried out to compare the means per demographic subgroup and Cronbach alpha coefficients were used to assess the internal consistency reliability properties of the psychometric instruments. Cronbach alpha coefficients contain important information regarding the proportion of variance explained by a particular scale (Jackson, van de Vijver & Ali, 2012). Pearson product-moment correlation coefficients were calculated to indicate the relationship between variables. The researcher made use of a statistician to analyse the data and verify the data analysis results to ensure accuracy.

## **RESULTS**

The results will be presented in two parts:

- An overview of the descriptive statistics of each scale is provided, including the Cronbach alphas for each scale to indicate reliability.
- An overview of the inferential statistics according to all stated hypotheses is provided.

## Descriptive statistical findings

The scales that were utilised to measure the associated variables were divided into and considered as indices, and each index was computed as the average of the answers to the constituent items standardised to percentages. Table 3 represents the descriptive statistics of the indices. The means of the indices are similar, except for the Flourishing Scale that has a higher mean than the others.

Table 3

Descriptive statistics for the variable indices

	N	Minimum	Maximum	Mean	Std. Deviation
% Cross-cultural Adjustment	145	11.11	98.15	67.02	16.93
% Positive and Negative Experience	137	20.83	100.00	66.15	14.50
% Positive Experience	137	16.67	100.00	67.91	15.35
% Negative Experience (Reversed)	137	20.83	100.00	64.39	16.75
% Satisfaction Scale	134	13.33	100.00	68.03	19.93
% Flourishing Scale	131	43.75	100.00	76.02	12.82
% Subjective Wellbeing	131	28.00	100.00	69.78	13.44
% Intent to stay	130	.00	100.00	67.56	26.17
Valid N (list wise)	130				

Before combining several items into one measure, the consistency of the items needs to be verified in order to obtain a reliable measure (Cronbach, 1951; Novick & Lewis, 1967). Cronbach's alpha is a coefficient of internal consistency where a value of 0.8 or more is considered excellent, and a value between 0.6 and 0.8 is acceptable. Table 4 presents the Cronbach alphas for the measures used in the study. Spousal cross-cultural adjustment was measured using the Spousal adjustment scale that consisted of 9 items. The value of the Cronbach alpha is 0.841 which is regarded as excellent. The answers provided by the respondents are consistent, therefore cross-cultural adjustment calculated as an average of the scores of the 9 items will be a reliable measure.

Subjective well-being was measured using three subscales, namely Satisfaction with Life Scale, Flourishing scale, and Scale of Positive and Negative Experience (SPANE). Satisfaction with Life was measured using 5 items. The value of the Cronbach alpha is 0.862 which is regarded as excellent.

Table 4

Internal consistencies and reliability of variable scales used

Variable scales	Case Processing Summary			Reliability Statistics	
	Cases	N	%	Cronbach's Alpha	N of items
Spousal cross-cultural adjustment	Valid	145	93.5	.841	9
	Excluded	10	6.5		
	Total	155	100.0		
Scale of Positive and Negative Experiences	Valid	137	88.4	.903	12
	Excluded	18	11.6		
	Total	155	100.0		
Satisfaction with Life	Valid	134	86.5	.862	5
	Excluded	21	13.5		
	Total	155	100.0		
Flourishing Scale	Valid	131	84.5	.820	8
	Excluded	24	15.5		
	Total	155	100.0		
Subjective well-being (general)	Valid	131	84.5	.933	25
	Excluded	24	15.5		
	Total	155	100.0		
Turnover Intention	Valid	130	83.9	.541	2
	Excluded	25	16.1		
	Total	155	100.0		

$\geq 0.8$  Acceptable Reliability

As indicated in the table above, satisfaction with life, calculated as an average of the scores of the 5 items, will be a very reliable measure (.862). Similarly, flourishing was measured using 8 items and was found to be very reliable yielding a Cronbach alpha of 0.820. Positive and negative affect were measured using 6 items for each affect. In the case of the negative affect items, they had to be reversed before they could be combined with the positive affect (*Negative Item (Reversed) = 100 - Negative Item*). The value of the Cronbach alpha is 0.903 for the combined items which is regarded as excellent. The responses from the participants were consistent across all of the measuring scales, making it feasible to use the results to indicate measurements of the constructs.

If we combine the 25 items that make up subjective well-being, the reliability analysis yields a Cronbach alpha of 0.933 which is also regarded as excellent. Thus the answers provided by the respondents are consistent and the calculated average of the scores will be a reliable measure.

Two items were added to the survey to gather information on the possible turnover intention of the expatriate spouse and their partners from Black and Stephens' (1989) questionnaire. Therefore turnover intention was measured with only two items resulting in an inadequate Cronbach alpha (0.541). The Spearman correlation was then applied and yielded a positive measure of 0.368 and is significant at the 1% level of significance, which means that the two items do not cancel each other out. The two items were then combined to form one measure.

## **Inferential findings**

Before investigating the correlations between the variables of interest, the correlations within the subjective well-being group was investigated to ensure that using the combined subjective well-being index would be viable. The Pearson correlations between the different factors of subjective well-being showed high significance (Table 5).

This shows that all of the sub components of subjective well-being relate positively with one another, for example, satisfaction with life is positively related to flourishing and vice versa. Therefore the correlation between indices can now be considered.

Table 5

## Correlations within the Subjective well-being group

		% Positive Experience	% Negative Experience (Reversed)	% Satisfaction Scale	% Flourishing Scale
% Positive Experience	Pearson Correlation	1	<b>.633**</b>	<b>.718**</b>	<b>.706**</b>
	Sig. (2-tailed)		.000	.000	.000
	N	137	137	134	131
% Negative Experience (Reversed)	Pearson Correlation	<b>.633**</b>	1	<b>.550**</b>	<b>.527**</b>
	Sig. (2-tailed)	.000		.000	.000
	N	137	137	134	131
% Satisfaction Scale	Pearson Correlation	<b>.718**</b>	<b>.550**</b>	1	<b>.704**</b>
	Sig. (2-tailed)	.000	.000		.000
	N	134	134	134	131
% Flourishing Scale	Pearson Correlation	<b>.706**</b>	<b>.527**</b>	<b>.704**</b>	1
	Sig. (2-tailed)	.000	.000	.000	
	N	131	131	131	131

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The  $p \leq 0.01$  (2-tailed) significance level was accepted for the interpretation of the results, indicating a 99% confidence interval level.

The correlations between the different indices are all significant, although they are lower than the correlations among the different sub components of subjective well-being. The planned comparison between the cross-cultural adjustment of the expatriate spouse and their subjective well-being (*Hypothesis 1*) yielded statistically significant results ( $p = .482$ ). In other words, the level of cross-cultural adjustment of the expatriate spouse is positively related to their level of subjective well-being and vice versa.

The planned comparison between the level of cross-cultural adjustment and turnover intention as well as the subjective well-being of the expatriate spouses and their turnover intention also yielded statistically significant results (albeit not very high) ( $p = .236$  and  $p = .390$  respectively). In other words, low cross-cultural adjustment and subjective well-being may result in an increase in turnover intention. However, this definitely requires further investigation using a more established

scale for turnover intention. An illustration of the correlations between the variables is depicted in Table 6.

Table 6  
Correlations between variable indices

		% Cross-cultural Adjustment	% Subjective Wellbeing	% Intent to stay
% Cross-cultural Adjustment	Pearson Correlation	1	.482**	.236**
	Sig. (2-tailed)		.000	.007
	N	145	131	130
% Subjective Wellbeing	Pearson Correlation	.482**	1	.390**
	Sig. (2-tailed)	.000		.000
	N	131	131	130
% Intent to stay	Pearson Correlation	.236**	.390**	1
	Sig. (2-tailed)	.007	.000	
	N	130	130	130

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The planned comparisons between the demographic factors of the sample population and the variables yielded some interesting results. Analysis of variance (ANOVA) was used to compare the means per sub group.

With regards to age, the only significant difference is in the positive affect subsection of the Scale of Positive and Negative Experiences with a p-value of .014. Post hoc testing showed the age group 40 to 49 years yielded the lowest results in the positive affect subsection.

The expatriate spouses who have children under the age of 18 whom have accompanied them on the global assignment yielded a much lower cross-cultural adjustment score than those without children, indicating that being responsible for children in the host country increases the challenge to adjust (*Hypothesis 2*). There are highly significant differences between groups in the means with respect to positive affect (.002), positive and negative affect (.008), and turnover intention (.007). There were moderately significant differences between groups in means with regards to negative affect (.080), and subjective well-being (.062). In most cases the participants without children had a higher mean score.

The comparison between expatriate spouse's ability to converse in the host language (German) and cross-cultural adjustment yielded significant results ( $p < .01$ ), indicating that low proficiency in language and communication abilities may hinder cross-cultural adjustment. In other words, fluency in the local language leads to higher mean scores in cross-cultural adjustment (*Hypothesis 2*).

Duration of current residence in the host country had a significant impact on the cross-cultural adjustment ( $p < .001$ ), with the means gradually increasing as periods of time grew longer; 0 to 3 months ( $\bar{x} = 56.4$ ), 4 to 7 months ( $\bar{x} = 68.7$ ), 8 to 11 months ( $\bar{x} = 65.8$ ), 1 to 2 years ( $\bar{x} = 68.1$ ), 2 to 3 years ( $\bar{x} = 70.8$ ), and more than 3 years ( $\bar{x} = 72.2$ ). The period 4 to 7 months was an anomaly in that it indicated higher levels of adjustment than 8 to 11 months and 1 to 2 years. The majority of the expatriate spouses in the sample population come from U.S.A and Canada. The rest of the respondents were divided into European countries, other countries, South Africa and United Kingdom. The only moderately significant differences in the comparisons between groups are for cross-cultural adjustment ( $p = 0.093$ ) and negative affect ( $p = 0.054$ ). In cross-cultural adjustment respondents from South Africa and United Kingdom scored the lowest means. In the case of negative affect, South Africans scored the lowest mean. In other words, expatriate spouses from South Africa and the United Kingdom may have a more difficult time adjusting to expatriate life than the comparison groups, and South African spouses may be more prone to negative experiences.

Previous overseas experiences failed to reach statistical significance although in all the cases participants who had lived abroad scored higher means. Employment status also did not reach statistical significance apart from the flourishing scale where the participants who are not working scored the lowest mean ( $p < .049$ ). With regards to sacrificing a career to accompany their spouses on the global assignments, the only significant difference is with respect to cross-cultural adjustment ( $p < .025$ ); where participants who had not given up a career scored the highest mean (*Hypothesis 2*).

Having a support network or social group yielded significant statistical differences in cross-cultural adjustment ( $p < .008$ ) (*Hypothesis 2*), and in most of the subjective well-being sub categories (positive and negative affect, .054; satisfaction with life, .037; flourishing, .031; subjective well-being, .029). In general, the participants with a large support base scored the highest mean, and the participants with no support base scored the lowest mean.

## **Summary**

In summary, the results show that the expatriate spouses' ability to adjust to the host country (cross-cultural adjustment) relates positively to their perceived happiness or subjective well-being (*Hypothesis 1*). And finally, although not all of the demographic factors provided significant differences between groups and cross-cultural adjustment, the results indicated that having children, being proficient in the host language, current duration in host country, home country, career sacrifice and having social support networks relate positively to cross-cultural adjustment.

## **DISCUSSION**

According to our literature on cross-cultural adjustment and subjective well-being, adaptation to major life events and subjective well-being are related to various degrees depending on the situational context (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). The main objective of the study was to explore the relationship between cross-cultural adjustment of expatriate spouses and their level of subjective well-being. Cross-cultural adjustment and subjective well-being, including the various components, were considered and explored as two distinct but conceptually linked constructs. Additionally, the study aimed to incorporate primary findings with different demographic factors such as gender, age, nationality, and previous overseas experience (to name a few), and to investigate whether these demographic groups differed significantly regarding these variables. The study explored these relationships and differences by testing the related hypotheses.

This study should benefit not only the industrial psychologists and human resource practitioners in understanding the psychological processes that expatriate spouses experience but also the multinational corporations who invest in international assignments and want to prevent premature turnover intention. The findings from the study can help inform future organisational interventions

for expatriate assignments by including the expatriate spouse in the preparation, training and support before, during and after the assignment.

### **The cross-cultural adjustment of expatriate spouses and their subjective well-being**

As previously stated, past research has shown that the adaptation of individuals to major changes or life events leads to a change in subjective well-being, albeit for various periods of time and various degrees depending on the situational context (Diener 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011). This study focused on the unique correlation between specifically cross-cultural adjustment and subjective well-being within the international context and over the period of the global assignment with its various phases. Results from the correlation analyses indicated that both interaction and general adjustment share a positive and significant correlation with subjective well-being components/indicators. This suggests that expatriate spouse subjective well-being may indeed be influenced by the expatriate spouse's adjustment to expatriate life. The results from the study supports previous research and the various findings concerning the positive relationship between adaptation and subjective well-being, but also provides a unique view into specifically spousal cross-cultural adjustment and its influence on subjective well-being levels. In other words, the expatriate spouse's adjustment appears to be both uniquely and positively related to their balance between positive and negative affect as well as their satisfaction with life. This confirms the first hypothesis of the study (*Hypothesis 1*) that spouses or partners' adjustment, specifically interaction and general adjustment is positively related to their subjective well-being.

### **Influence of demographic factors on the ability of the expatriate spouse to adjust**

Previous research has shown that various factors can influence the three dimensions of cross-cultural adjustment, including personality related factors, experience related factors, work related factors, and environmental factors (Bartone, Kelly & Matthews; 2013; Huang & Chang, 2011; Lievens, Harris, Van Keer & Bisqueret, 2003; Palthe, 2004; Purgat-Popiela, 2011; Williams, 2005;

Windiarti, Ferris & Berryman, 2014). Due to the majority of expatriate spouse that not working due to various reasons during the global assignment, the spousal adjustment scale only considers the general and interaction dimensions of adjustment. This being said, personal, organisational and cultural/environmental factors still influence the expatriate spouse (Purgat-Popiela, 2011).

As anticipated, the levels of perceived social support and feelings of belonging to a social network were associated with cross-cultural adjustment, suggesting that the perceived availability of socio-emotional and instrumental support holds significance for cross-cultural adjustment outcomes (Copeland & Norell, 2002; Diener, 2012, Erdogan et al., 2012). Support from other people is highly important to spouses' adjustment during cross-cultural transitions, which is not surprising given the challenges associated with expatriate life.

The results from the study showed that having accompanying dependents effects the cross-cultural adjustment of the expatriate spouse. This was an expected outcome of the study and supports the findings of previous researchers' findings (Purgat-Popiela, 2011; Schaffer & Harrison, 2001). This suggests that accompanying children constitute an important interpersonal-social base of identity, and thus represents an important facilitator of spousal adjustment (Shaffer & Harrison, 2001). Therefore, young children that accompany the expatriate family on the global assignment may increase the probability that the expatriate spouse will struggle to adjust to the cultural setting due to the added pressure associated with the interpersonal-social interaction with for example schools, teachers, educational principles, etc.

As expected, the expatriate spouse's proficiency in the host country's language has a significant effect on their cross-cultural adjustment. The participants who claimed to not be able to speak German at all scored the lowest in cross-cultural adjustment, with those who indicated moderate mastery having the second lowest and those who are fluent, the highest. This finding supports previous research indicating the importance of language ability and its relation to cross-cultural adjustment (De Cieri et al., 1991; Jones-Corley, 2002; Marten & Grant, 2008; Sims & Schraeder, 2004).

Career sacrifice showed a significant relationship with cross-cultural adjustment, indicating that expatriate spouses who had sacrificed careers to accompany their spouses on the international assignment had a more difficult time adjusting to the host country. This could be due to the spouses seeing their roles change compared to their roles in the home country, and becoming discontent

because of this reformulation of their identity in the new culture (Bechter & Stommel, 2011). Those participants who were not working in the home countries before they moved to the host country showed a much higher level of cross-cultural adjustment than their counterparts. Therefore their adjustment involved purely cultural differences whereas it added role changes for the previously working participants.

The amount of time that has passed since arriving in the host country also had a significant relationship with the level of cross-cultural adjustment of expatriate spouses, increasing as more time lapsed. The study's model of cross-cultural adjustment with regards to the phases of psychological adjustment supports this finding (De Cieri et al., 1999; Purgat-Popiela, 2011). As time passes, culture shock subsides and culture novelty wears off, expatriate spouses generally start to adjust to life in the host country, although they may never totally adjust before they have to return to their home countries (Diener, 2012). The results indicated that the expatriate spouses who have been living in the host country between 4 to 7 months showed very slightly higher adjustment levels than 8 months to 2 years, although the difference in means was not significant enough to draw conclusions on this slight anomaly.

Nationality yielded interesting results as a significant difference was identified in the cross-cultural adjustment levels of the South African and British expatriate spouses. This was an unexpected result and suggests that the cultural difference or 'distance' between these two countries and the host country (Germany) is most likely broad enough to affect adjustment levels (Haslberger, 2005; Palthe, 2004).

The results from the study confirm the second hypothesis (*Hypothesis 2*) that various demographic factors have an influence on the cross-cultural adjustment. Not all of the demographic factors investigated in the study yielded positive relationships with cross-cultural adjustment, although this was expected at the onset of the study. Gender, age, previous overseas experience and employment status showed no significant relationship with cross-cultural adjustment although the participants with previous overseas experience showed a higher cross-cultural adjustment mean and subjective well-being mean for those who had previously lived abroad. The findings related to previous international experience were contrary to expectation, but it could be possible that previous international experience is most beneficial when it is relevant to the cultural context of the global assignment, which in turn enhances the extent to which previous experience can aid cross-cultural adjustment. The current study did not identify the context of previous international experience and

whether it was in the same cultural context of the assignment. Although earlier research has indicated that previous international experience may have a positive influence on cross-cultural adjustment (e.g. Puck et al., 2003), other researchers have also found that previous international experience is not always related to spousal adjustment (Copeland & Norell, 2002; Wilson, 2011).

### **Supplementary findings**

Although these demographic factors did not relate directly to cross-cultural adjustment, age and employment status related positively to certain indicators of subjective well-being.

The effects of age on subjective well-being yielded significant results in terms of positive affect, where expatriate spouses between the ages of 40 and 49 scored very low in comparison to the other age groups. This could be due to the other age groups scoring higher on both positive and negative affect and only the 40 to 49 age group scoring relationally on the collective opposites. This could be another avenue for further research.

Dependents or children that accompany the expatriate family on assignment also have a significant effect on the subjective well-being of the expatriate spouse. The results indicated a highly significant and positive relationship between having dependents and positive and negative affect. There was also a moderate relationship between spouses with dependents and subjective well-being in general. There is not a lot of research that indicates the relationship between accompanying dependents and the subjective well-being of the expatriate spouse, however with the direct correlation between cross-cultural adjustment and subjective well-being, the results could be explained by the spill-over effect (Dolan et al., 2008) although further research is necessary. This in turn could affect the turnover intention of the expatriate spouse as the results have indicated a highly significant relationship between spouses with children and their intention to terminate the assignment prematurely.

The nationality of the expatriate spouses also appear to have a significant effect on their subjective well-being as the results show that the South African spouses have a higher level of negative affect than any of the other nationality groups. This could once again be a culturally significant aspect of the South African group as a whole and not only the expatriate spouses. The flourishing scale of the

expatriate spouses in general was also lowest amongst participants who are not currently working in the host country, possibly indicating that feelings of competence associated with flourishing may be lower than those of the working expatriate spouses (Diener et al., 2010).

Lastly, as anticipated, the absence of a support or social network for the expatriate spouses resulted in a significantly lower report of subjective well-being, satisfaction with life and positive and negative affect. These findings support the wide ranging consensus across the literature that a positive relationship exists between social support and subjective well-being (Diener & Oishi, 2005). In principle, the results and the existing literature suggests that spouses or partners' perceived receipt of social support may influence their emotions and cognitions in a way that promotes their subjective experience of life satisfaction and effective mood regulation (Wilson, 2011).

### **Possible limitations of the study**

The major limitation of this study is that the data was obtained using a cross-sectional design constituting a cross-sectional questionnaire. This approach lacks the ability to gather information regarding cause and effect, because the exposure and outcome are simultaneously assessed so there is generally no evidence of a temporal relationship between exposure and outcome. Additionally, the design impacts the population validity, and the results can therefore only be generalised to expatriate spouses residing in Germany, which comprises its own set of values, culture and possible impacting factors. In cross-sectional research such as this, there are no interventions, and units are not randomly assigned to the levels of the independent variable. Therefore, the extent to which the researcher was able to predict whether a change in the dependent variable was related to a change in the independent variable was limited due to the possibility of alternative explanations, and difficulty in determining directionality.

The second limitation to the study was the small convenience sample (N=130 complete surveys), although it still adheres to the recommended case-to-variable ratio. This again impacts on the generalizability of the findings. However, obtaining access to an expatriate population is extremely difficult for researchers as Harrison et al. (2004) pointed out.

Another limitation of the study was that all of the dependent measures in the survey was self-reported and thus raise the possibility of social desirability and response bias. On the other hand, most of the measures, for example satisfaction with life and the scale of positive and negative experiences, are by definition tapping subjective constructs.

Finally, due to the data being obtained via a cross-sectional self-report survey, it is important to acknowledge that observed relationships may in part be due to common-method variance (variance attributable to the measurement method rather than to the constructs). For example, given that the questionnaire was administered electronically, this method might influence results for those participants who may not be as familiar with an electronic survey interface.

### **Implications for Practice**

Although the study had very few male participants, resulting in their exclusion from the results, the literature indicates that the number of male expatriate spouses is increasing which in part highlights the changing nature of expatriate assignments. There is also a growing trend in dual career couples working where the expatriate spouse also joins the workforce in the host country, further indicating the changing nature of assignments. Due to this changing context of expatriation, acknowledging the expatriate spouse is becoming more important as organisations strive to ensure success in their global assignments and stay competitive in the global marketplace.

A possible implication for practice associated with the working spouse is the difficulties associated with obtaining employment and having permission to work in host countries. Without organisational assistance, spouses may not be able to overcome the associated challenges or find it incredibly difficult. There are additional advantages associated with the working spouse such as the important role it plays in the spouse's identity as well as creating a platform for social networking and support.

Organisations could provide assistance by utilising relocation companies that provide spouses with destination consultants and general direct assistance with aspects such as finding accommodation, setting up bank accounts, and locating key institutions such as healthcare facilities schools and

emergency services. This could help initiate and ease the cross-cultural adjustment of the expatriate spouse in the initial few weeks.

Integration seminars could be implemented as a part of the relocation initiative focusing specifically on the typical cultural differences experienced in the host country as well as identifying important areas of interest that require prior knowledge. This type of programme could also provide the opportunity to voice concerns, ask questions and to gather information regarding the fears and causes of anxiety in the expatriate family to further programme development.

A plethora of information and research exists on the negative aspects of expatriate life, therefore the factors that have been identified as having a positive effect on cross-cultural adjustment of the expatriate spouse can serve as an opportunity to investigate and develop these areas a little further.

## **Conclusion**

Research in the subject of expatriation and the effects of global assignments on the expatriate spouse is starting to increase, but much more is needed to understand the more complex processes associated with the unique experiences of the spouse. The findings of the study contribute to the growing literature on cross-cultural adjustment of the expatriate spouse and support the relevance of paying attention to their experiences and understanding the factors that contribute to better adjustment. The results help extend the existing literature by confirming the impact of cross-cultural adjustment on the expatriate spouse's subjective well-being and identifying what factors influence both constructs.

As the literature from previous research highlighted, adjusted expatriate spouses can serve as important resources in international assignments, providing support, affirmation, and comfort during the stressful periods of adjustment for the expatriate employee (Edstrom & Jervors, 2007). At the same time, neglecting to acknowledge the influence of the spouse on the success of the expatriate assignment could increase the chances of more assignments being prematurely terminated as a result of an unadjusted spouse. Gaining a deeper understanding into the expatriate spouse's experiences as well as recognising and managing this potential asset will undoubtedly

assist multinational organisations in their undertaking to enhance assignment success and so compete more effectively in the growing global market.

Given the relationship between cross-cultural adjustment and subjective well-being, continued research in enhancing and assisting cross-cultural adjustment in expatriate spouses is essential and should feature as a key consideration in expatriate management. Additional factors that appear to be integral to influencing the adjustment of the expatriate spouse includes having dependents accompany the expatriate family on assignment, language proficiency, length of stay, nationality in some cases, career sacrifice and the existence of a support network. Furthermore, the significant and positive relationship between cross-cultural adjustment and the spouses' positive and negative affect reconfirms the need to ensure that factors important to the positive adjustment of the spouse are more clearly understood.

### **Future research**

Although the majority of the participants indicated that they are unemployed in the host country, 18.91% of the sample expatriate spouses indicated that they were either employed full-time, part-time or volunteering therefore the absence of a work component from the spousal adjustment scale may mean that the adjustment issues are inadequately captured. The inclusion of a work component in future studies would definitely be worthwhile as more and more spouses join the workforce in the host countries.

A longitudinal study design for future investigations into the causal relationship between cross-cultural adjustment and various demographic factors could prove invaluable in future research. The spouse's experiences could be mapped through the proposed phases of adjustment and an investigation into the impact of time on cross-cultural adjustment and subjective well-being can be addressed. In summary, a longitudinal design can assist in understanding the predictors and the long reaching impacts on the spouse's cross-cultural adjustment and subjective well-being.

There are many exciting research directions in subjective well-being therefore interventions to increase happiness as described and studied by Lyubomirsky and Della Porta (2010) and Seligman, Rashid, and Parks (2005a) in expatriate spouses may prove to be a valuable area of investigation.

Also personality has been shown to be a reliable predictor of subjective well-being, so further investigations into the effects of personality on subjective well-being in expatriate spouses would be warranted.

Investigations into the effectiveness of current organisational initiatives to incorporate the expatriate spouse in preparation training and adjustment in the host country could prove worthwhile especially in creating opportunities for the spouses to network with other expatriate spouses and host nationals to form social support networks.

Finally, the factors identified as having an impact of cross-cultural adjustment such as having dependents and language proficiency deserves more attention and appears to be warranted in future research to identify areas for possible intervention strategies for the international organisations.

## **CHAPTER 4. CONCLUSIONS, LIMITATION AND RECOMMENDATIONS**

In this final chapter the focus will be on the conclusions drawn, based on this study. The limitation connected to the empirical research and literature reviews will be highlighted and recommendations will be discussed for practical implementations of the findings.

### **4.1 CONCLUSIONS RELATED TO THE LITERATURE REVIEW**

In terms of the literature review, the aim of the study was to discuss:

- Previous research on and the conceptualisation of cross-cultural adjustment from a theoretical perspective and how it affects the expatriate spouse.
- Previous research on and the conceptualisation of subjective well-being from a theoretical perspective and the well-being of the expatriate spouse
- The theoretical relationship between cross-cultural adjustment and subjective well-being and how it applies to the expatriate spouse.

In general these aims were achieved by conceptualizing and discussing concepts and debates in the existing literature.

#### **4.1.1 Cross-cultural adjustment of the expatriate spouse**

In chapter 2 it was reported that the majority of the existing literature on cross-cultural adjustment is focused on the expatriate employee with very few studies on the adjustment of the spouse, although the maladjustment of the spouse is cited as one of the major causes for premature turnover intention (Ali et al., 2003; Black & Stephens, 1989; Calgiuri et al., 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; van Erp et al., 2010; Shaffer & Harrison, 2001; Vogel et al., 2008). The literature conceptualises cross-cultural adjustment as a multi-faceted construct consisting of three dimensions namely work, interaction and general adjustment (Black et al. 1991; Chang, 1997; Palthe, 2004; Purgat-Popiela; 2011). However, due to the majority of expatriate spouses not

working during the global assignment, the spousal adjustment scale does not include items based on work adjustment (Black & Stephens, 1989; De Cieri et al., 1991; Purgat-Popiela, 2011; Shaffer & Harrison, 2001).

The literature also indicated that expatriate spouses go through various psychological phases along with the socio-cultural dimensions of adjustment, but many of them need to brave this alone as support structures are not in place to ease the transitions between phases (De Cieri et al., 1991; Purgat-Popiela, 2011; Shaffer & Harrison, 2001). Social support was identified as one of the most important factors influencing the cross-cultural adjustment of the expatriate spouse (Black & Gregersen, 1991; Erdogan et al., 2012; Haslberger, 2005), and without the interactive and social factors associated with working in the host country, the spouse often becomes socially isolated (Black & Gregersen, 1991; Jones-Corley, 2002; Purgat-Popiela, 2011). This was identified as just one of many factors that may influence the cross-cultural adjustment of the expatriate spouses, as the anticipation of cultural differences, living conditions, culture novelty, previous overseas experience, language fluency, personality factors, company assistance, and change in employment status (to name a few) may also influence the spouse's ability to adjust (Bechter & Stommel, 2011; Black & Gregersen, 1991; De Cieri et al., 1999; Haslberger, 2005; Jones-Corley, 2002; Martens & Grant, 2008; Purgat-Popiela, 2011; Shaffer & Harrison, 2001).

Conclusions drawn from the literature review for cross-cultural adjustment of expatriate spouses are as follows.

Several authors seem to agree that further research on the unique experiences of the expatriate spouse's adjustment is required (Ali et al., 2003; Bechter & Stommel, 2011; Black & Gregersen, 1991; Black & Stephens, 1989; Caligiuri et al., 1998; Copeland & Norell, 2002; De Cieri et al., 1991; De Pamich, 2007; Jones-Corley, 2002; Kraimer et al., 2001; Long, 2010; Martens & Grant, 2008; Puck et al., 2003; Purgat-Popiela, 2011; Shaffer & Harrison, 2001; Takeuchi et al., 2002; van der Bank & Rothmann, 2006; Van Erp et al., 2011). With an increase in global assignments, acknowledging the spouse as a resource will be imperative to increase assignment success.

Although the number of expatriate spouses who also work in the host country is less than those who do not, the number of dual career expatriate spouses is slowly increasing. Therefore the absence of a work component from the spousal adjustment scale may mean that the adjustment issues are inadequately captured (Purgat-Popiela, 2011; Wilson, 2011).

Social support is vital for the adjustment of the expatriate spouses although many do not have a support network (Black & Gregersen, 1991; Erdogan et al., 2012; Haslberger, 2005). Many additional factors also influence the spouse's ability to adjust, therefore further research is required to identify these factors and the measure to what degree they influence spousal cross-cultural adjustment (Bechter & Stommel, 2011; Black & Gregersen, 1991; De Cieri et al., 1999; Haslberger, 2005; Jones-Corley, 2002; Martens & Grant, 2008; Purgat-Popiela, 2011; Shaffer & Harrison, 2001).

#### 4.1.2 Subjective well-being of the expatriate spouse

In chapter two, the literature clarified the components of subjective well-being as being (very broadly) positive affect, negative affect, and life satisfaction (Diener, 1984; Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Myers & Diener, 1995). The literature described different theories based on subjective well-being, how they affected the components of well-being, as well as the factors associated with changes in an individual's level of well-being (Baumann et al., 2005; Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011; Michalos, 1985; Thoits, 2014; Wood, 1996).

The discrepancy theory described life satisfaction as being a function of need satisfaction where individuals constantly compare their current state to their ideal state and identify what is missing or still needed (Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Michalos, 1985). The major component of this theory was social comparisons in relation to the self (Diener 2012; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011; Thoits, 2014; Wood, 1996). Goal aspirations, situational contexts, cultural differences and adaptation and coping (Baumann et al., 2005; Diener, 2012; Diener et al., 1999; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2012) were identified as having the greatest impact on subjective well-being, all of which are characteristics experienced and shared by expatriate spouses.

Various demographic factors were identified in the literature that influences subjective well-being, a number of which characterise the expatriate spouse. Perceived health, income, religion, marital status, employment status, age, gender, job morale, community involvement, and education were

amongst the demographic factors identified (Diener 2012; Diener et al., 1999; 2000; Dolan et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011; Wilson, 1967).

Finally, subjective well-being was also conceptualised in the literature as varying as a function of temperament and life choices (Howell et al., 2011; Schüller et al., 2013). This suggested that subjective well-being is increased by various behaviours that feed three innate psychological needs namely competence, relatedness, and autonomy (Eryilmaz, 2011; Howell et al., 2011). These psychological needs supersede demographic factors and are considered to be universal. These psychological needs are associated with need satisfaction suggesting that once biological needs are taken care of these needs are innately sought after (Schüler et al., 2013).

Conclusions drawn from the literature review for subjective well-being of expatriate spouses are as follows.

Regardless of cultural parameters, various factors both psychological and demographic influence an individual's subjective well-being. Need satisfaction, the perceived absence of various psychological and life satisfaction needs, and the ability to adapt and cope will likely influence the expatriate spouse's subjective well-being during the global assignment.

Demographic factors can influence the subjective well-being of the expatriate spouse, making it important to identify and understand them in the context of the global assignment. Not all demographic factors will have an equal degree of impact on the expatriate spouse.

#### 4.1.3 Cross-cultural adjustment, subjective well-being and the expatriate spouse

In Chapter 2, various research on the effects of adaptation or adjustment on the subjective well-being of an individual (Brickman et al., 1976; Diener 2012; Diener et al., 1999; Erdogan et al., 2012; Folkman, 1997; Krauss et al., 1990; Luhmann et al., 2012; Lyubomirsky et al., 2011; Mehnert et al., 1990; Silver, 1982; Vitaliano et al., 1990) was identified and discussed. It was reported that different life events affect a person's subjective well-being whether it be in a positive or negative sense and that as time passes a person adjusts to the stimulus resulting in a decreased emotional response (Diener 2012; Erdogan et al., 2012; Luhmann et al., 2012). It was also suggested that complete adjustment is not always possible and may extend over a number of years

(Diener et al., 2012; Erdogan et al., 2012; Luhmann et al., 2012), the rate sometimes depending on demographic differences between individuals (Diener 2012; Luhmann et al., 2012), raising the question what the parameters are of the expatriate spouse's ability to adjust to the cross-cultural effects of the host country and how long it would take them to adjust, if ever.

The conclusion drawn from the literature review for the relationship between cross-cultural adjustment and subjective well-being of expatriate spouses is that adjustment will differ for various groups and may never be fully completed depending on the length of the contract and various demographic factors. This raises the need for further research on this subject area.

## **4.2 CONCLUSIONS RELATED TO THE EMPIRICAL STUDY**

As the literature review pointed out, various studies have been conducted on the cross-cultural adjustment of the expatriate spouse (Ali et al., 2003; Black & Stephens, 1989; Calgiuri et al., 1998; De Cieri et al., 1991; Purgat-Popiela, 2011; van Erp et al., 2010; Shaffer & Harrison, 2001; Vogel et al., 2008), subjective well-being and the demographic factors that influence it (Diener 2012; Diener et al., 1999; 2000; Dolan et al., 2008; Erdogan et al., 2012; Luhmann et al., 2012; Lyubomirsky et al., 2011; Wilson, 1967), and the relationship between adaptation/adjustment and subjective well-being (Brickman et al., 1976; Diener 2012; Diener et al., 1999; Erdogan et al., 2012; Krauss et al., 1990; Luhmann et al., 2012; Lyubomirsky et al., 2011; Mehnert et al., 1990; Vitaliano et al., 1990). This study compared the various demographic groups with the cross-cultural adjustment and associated subjective well-being of the expatriate spouse with the intention to contribute to the current understanding of the relationship between these variables.

The study aimed to answer the research questions stated in the form of hypotheses:

H0<sub>1</sub>: Spouses/Partners' adjustment, specifically interaction and general adjustment, will not be positively related to their subjective well-being.

H1<sub>1</sub>: Spouses/Partners' adjustment, specifically interaction and general adjustment, will be positively related to their subjective well-being.

H0<sub>2</sub>: Various demographic factors will have no influence on the expatriate spouse/partner's ability to adjust.

H1<sub>2</sub>: Various demographic factors influence the expatriate spouse/partner's ability to adjust.

#### 4.2.1 Conclusions on the relationship between cross-cultural adjustment and subjective well-being of expatriate spouses

Given the relationship between cross-cultural adjustment and subjective well-being identified in the study, it is assumed that the inability of the expatriate spouse to adjust to the host country will most likely have a negative impact on the subjective well-being experienced by the spouse. Continued research in enhancing and assisting cross-cultural adjustment in expatriate spouses is essential and should feature as a key consideration in expatriate management. The significant and positive relationship between cross-cultural adjustment and the spouses' positive and negative affect reconfirms the need to ensure that factors important to the positive adjustment of the spouse are more clearly understood. The findings of the study contribute to the growing literature on cross-cultural adjustment of the expatriate spouse and support the relevance of paying attention to their experiences and understanding the factors that contribute to better adjustment.

#### 4.2.2 Conclusions on the demographic factors that influence cross-cultural adjustment

Although the study had very few male participants, the literature and the results indicate that the number of male expatriate spouses is increasing which in part highlights the changing nature of expatriate assignments. There is also a growing trend in dual career couples where the expatriate spouse also joins the workforce in the host country, further indicating the changing nature of assignments. Due to this changing context of expatriation, acknowledging the expatriate spouse is becoming more important as organisations strive to ensure success in their global assignments and stay competitive in the global marketplace.

Additional factors that appear to be integral to influencing the adjustment of the expatriate spouse includes having dependents accompany the expatriate family on assignment, language proficiency, length of stay, nationality in some cases, career sacrifice and the existence of a support network. Creating another area of research that needs attention.

#### 4.2.3 General conclusion based on the empirical outcomes

The results help extend the existing literature by confirming the impact of cross-cultural adjustment on the expatriate spouse's subjective well-being and identifying what factors influence both constructs. As the literature from previous research highlighted, adjusted expatriate spouses can serve as important resources in international assignments, providing support, affirmation, and comfort during the stressful periods of adjustment for the expatriate employee (Edstrom & Jervors, 2007). At the same time, neglecting to acknowledge the influence of the spouse on the success of the expatriate assignment could increase the chances of more assignments being prematurely terminated as a result of an unadjusted spouse. Gaining a deeper understanding into the expatriate spouse's experiences as well as recognising and managing this potential asset will undoubtedly assist multinational organisations in their undertaking to enhance assignment success and so compete more effectively in the growing global market.

### 4.3 LIMITATIONS

The limitations of the literature review and empirical study will be discussed below.

#### 4.3.1 Limitations of the literature review

Whilst the topic of cross-cultural adjustment of the expatriate spouse has not yielded a lot of research in the past, the literature in the past few years has increasingly started to acknowledge and even focus on the effects of the expatriate spouse's adjustment on the expatriate employee. Even so, general research on the effects of the global assignment and expatriation on the expatriate spouse is limited and requires further undertaking.

#### 4.3.2 Limitations of the empirical study

The major limitation of this study is that the data was obtained using a cross-sectional design constituting a cross-sectional questionnaire. This approach lacks the ability to gather information

regarding cause and effect, because the exposure and outcome are simultaneously assessed so there is generally no evidence of a temporal relationship between exposure and outcome. Additionally, the design impacts the population validity, and the results can therefore only be generalised to expatriate spouses residing in Germany, which comprises its own set of values, culture and possible impacting factors. In cross-sectional research such as this, there are no interventions, and units are not randomly assigned to the levels of the independent variable. Therefore, the extent to which the researcher was able to predict whether a change in the dependent variable was related to a change in the independent variable was limited due to the possibility of alternative explanations, and difficulty in determining directionality.

The second limitation to the study was the small convenience sample (N=130 complete surveys), although it still adheres to the recommended case-to-variable ratio. This again impacts on the generalizability of the findings. However, obtaining access to an expatriate population is extremely difficult for researchers as Harrison et al. (2004) pointed out.

Another limitation of the study was that all of the dependent measures in the survey was self-reported and thus raise the possibility of social desirability and response bias. On the other hand, most of the measures, for example satisfaction with life and the scale of positive and negative experiences, are by definition tapping subjective constructs.

Finally, due to the data being obtained via a cross-sectional self-report survey, it is important to acknowledge that observed relationships may in part be due to common-method variance (variance attributable to the measurement method rather than to the constructs). For example, given that the questionnaire was administered electronically, this method might influence results for those participants who may not be as familiar with an electronic survey interface.

### **4.3 RECOMMENDATIONS**

The following recommendations were made for multinational organisations and for future research.

#### 4.3.1 Recommendations for multinational organisations

International organisations need to incorporate more initiatives focused on the impatriation of the expatriate spouse into the host country to help prevent negative influences on the success of the global assignment. The following recommendations are made based on the literature and study results.

- It is recommended that once expatriate families have been selected for relocation, multinational organisations could provide pre-departure intercultural training which has been indicated to positively relate to intercultural adaptation.
- Financial allowances could be created to assist in becoming proficient in the host country's language and to support further studies for the expatriate spouses if they would choose to do so rather than working.
- Organisations could consider providing assistance to expatriate spouses who indicate that they would like to work in the host country, and support them in finding suitable employment and obtaining the needed permission to work as stipulated in the associated country. A possible implication for practice associated with the working spouse is the difficulties associated with obtaining employment and having permission to work in host countries. Without organisational assistance, spouses may not be able to overcome the associated challenges or find it incredibly difficult. There are additional advantages associated with the working spouse such as the important role it plays in the spouse's identity as well as creating a platform for social networking and support.
- Organisations could provide assistance by utilising relocation companies that provide spouses with destination consultants and general direct assistance with aspects such as finding accommodation, setting up bank accounts, and locating key institutions such as healthcare facilities schools and emergency services. This could help initiate and ease the cross-cultural adjustment of the expatriate spouse in the initial few weeks.
- Integration seminars could be implemented as a part of the relocation initiative focusing specifically on the typical cultural differences experienced in the host country as well as identifying important areas of interest that require prior knowledge. This type of programme could also provide the opportunity to voice concerns, ask questions and to gather information regarding the fears and causes of anxiety in the expatriate family to further programme development.

A plethora of information and research exists on the negative aspects of expatriate life, therefore the factors that have been identified as having a positive effect on cross-cultural adjustment of the expatriate spouse can serve as an opportunity to investigate and develop these areas a little further.

#### 4.3.2 Recommendations for future research

Research in the subject of expatriation and the effects of global assignments on the expatriate spouse has started to increase, but much more is needed to understand the more complex processes associated with the unique experiences of the spouse.

Although the majority of the participants indicated that they are unemployed in the host country, 18.91% of the sample expatriate spouses indicated that they were either employed full-time, part-time or volunteering. Therefore the absence of a work component from the spousal adjustment scale may mean that the adjustment issues are inadequately captured. The inclusion of a work component in future studies would definitely be worthwhile as more and more spouses join the workforce in the host countries.

A longitudinal study design for future investigations into the causal relationship between cross-cultural adjustment and various demographic factors could prove invaluable in future research. The spouse's experiences could be mapped through the proposed phases of adjustment and an investigation into the impact of time on cross-cultural adjustment and subjective well-being can be addressed. In summary, a longitudinal design can assist in understanding the predictors and the long reaching impacts on the spouse's cross-cultural adjustment and subjective well-being.

There are many exciting research directions in subjective well-being therefore interventions to increase happiness as described and studied by Lyubomirsky and Della Porta (2010) and Seligman, Rashid, and Parks (2005a) in expatriate spouses may prove to be a valuable area of investigation. Also personality has been shown to be a reliable predictor of subjective well-being, so further investigations into the effects of personality on subjective well-being in expatriate spouses would be warranted.

Investigations into the effectiveness of current organisational initiatives to incorporate the expatriate spouse in preparation training and adjustment in the host country could prove worthwhile especially in creating opportunities for the spouses to network with other expatriate spouses and host nationals to form social support networks.

Finally, the factors identified as having an impact of cross-cultural adjustment such as having dependents and language proficiency deserves more attention and appears to be warranted in future research to identify areas for possible intervention strategies for the international organisations.

#### **4.4 CHAPTER SUMMARY**

Both the literature and the findings from the study has identified the importance of the expatriate spouse in the success of the global assignment, making it imperative to understand the effects of cross-cultural adjustment on their subjective well-being as well as what demographic factors can influence both constructs. The primary limitation of the existing literature as well as the findings of the study was that the state of the expatriate spouse's cross-cultural adjustment and subjective well-being respectively is more often than not measured at a certain point in time (cross-sectionally) and not measured over an extended period of time (longitudinally) to identify the cause and effect of the constructs on each other. This creates a broad area for potential research and calls for further investigation. Multinational organisations that make use of expatriate assignments as part of their overall business strategy could assist the adjustment of the spouse by employing various initiatives to assist them in the transition from their home country into the host country.

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